



# Quickstart Guide



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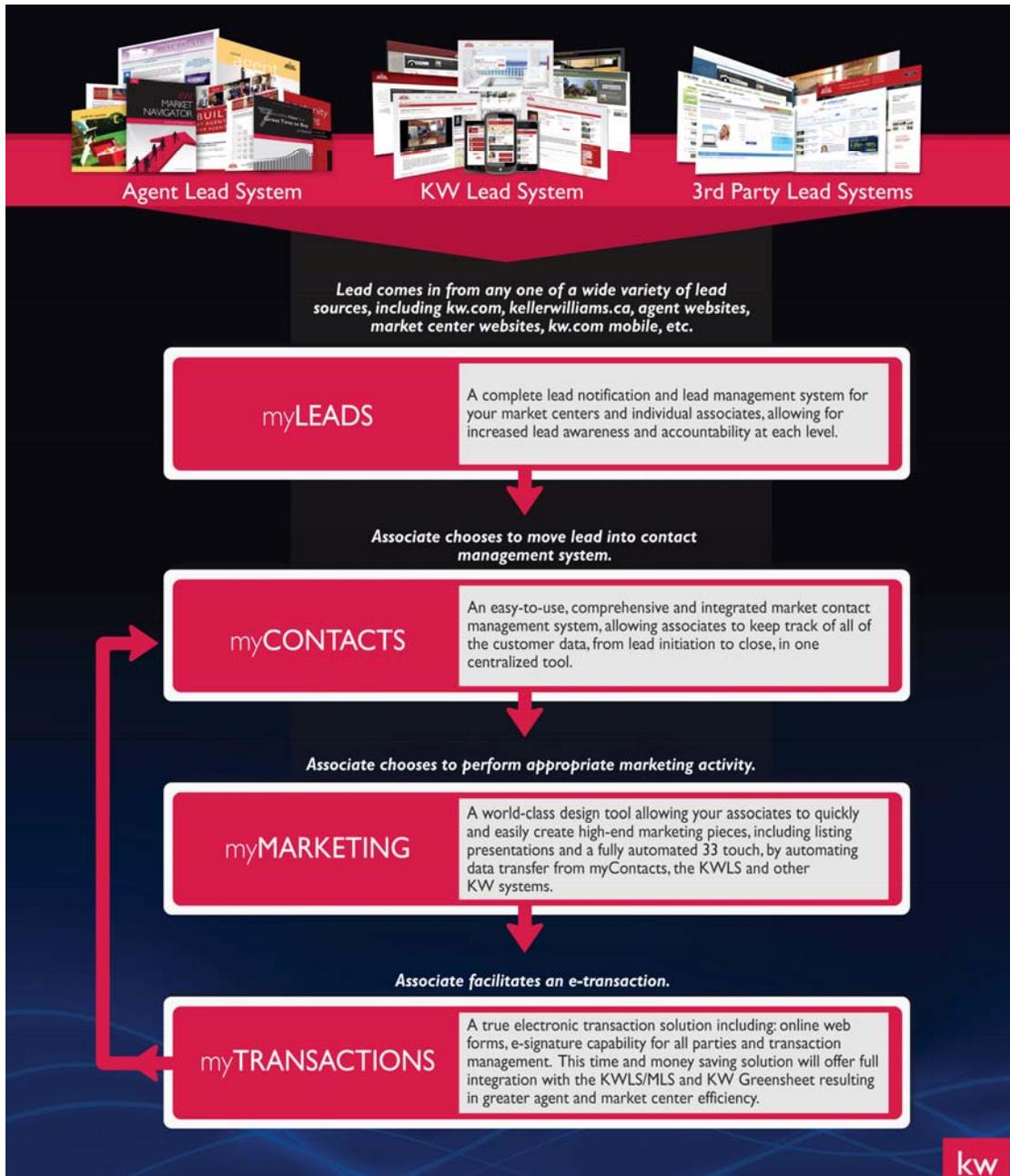


# Lesson 1: What is eEdge

## What is eEdge?

eEdge is the real estate industry's first and only COMPLETE lead-to-close agent business solution - available exclusively to Keller Williams associates. It includes lead management and routing capabilities, full contact management, a professional marketing library and a true paperless transaction system--all in one integrated, efficiency-increasing package.

It is a single, integrated system that does business the way you do business.

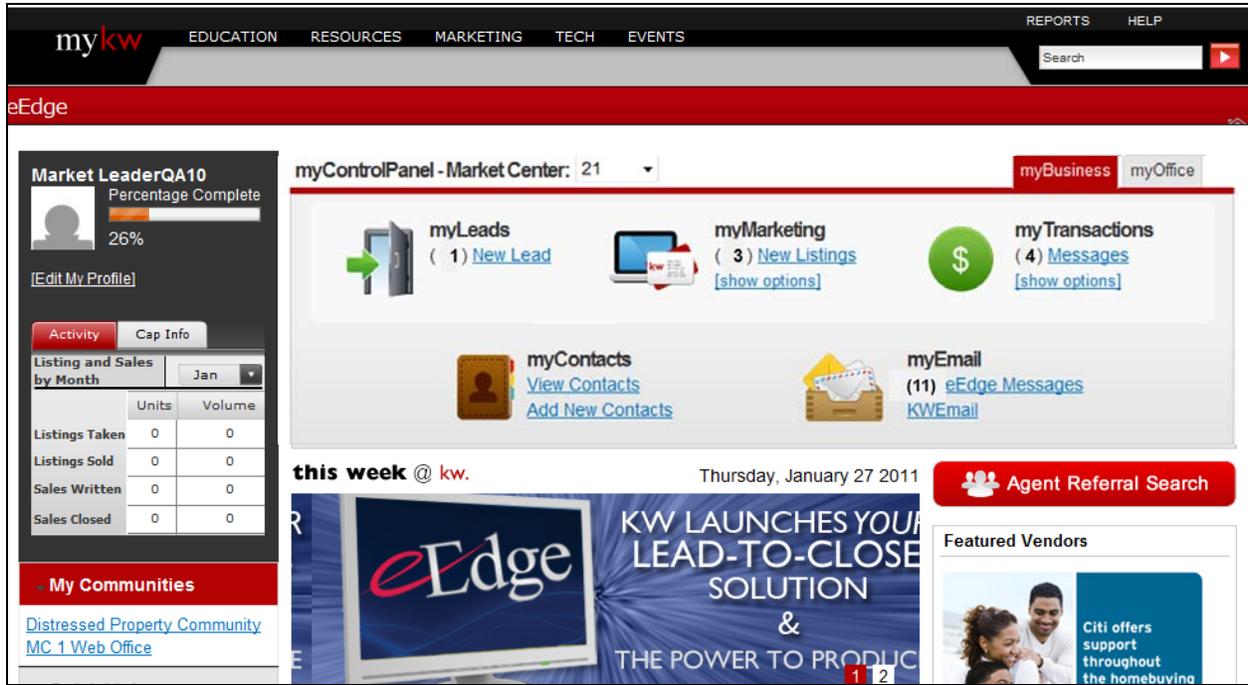


The triangle represents your real estate business. At the core of our business is myContacts which is fed by myLeads which are then cultivated by myMarketing and closed through myTransactions, allowing us to leverage our time and focus on what matters most. From the Millionaire Real Estate Agent book, we know that our business is our database. So everything you do, is centered around myContacts.



## Your eEdge Control Panel

Each day, login to mykw.kw.com. Right there on the homepage, you'll see your eEdge dashboard.



mykw EDUCATION RESOURCES MARKETING TECH EVENTS REPORTS HELP

Search

eEdge

Market LeaderQA10  
Percentage Complete  
26%  
[Edit My Profile]

Activity Cap Info

Listing and Sales by Month  
Jan

	Units	Volume
Listings Taken	0	0
Listings Sold	0	0
Sales Written	0	0
Sales Closed	0	0

My Communities  
Distressed Property Community  
MC 1 Web Office

myControlPanel - Market Center: 21

myBusiness myOffice

myLeads ( 1 ) New Lead

myMarketing ( 3 ) New Listings [show options]

myTransactions ( 4 ) Messages [show options]

myContacts View Contacts Add New Contacts

myEmail (11) eEdge Messages KWEmail

this week @ kw. Thursday, January 27 2011

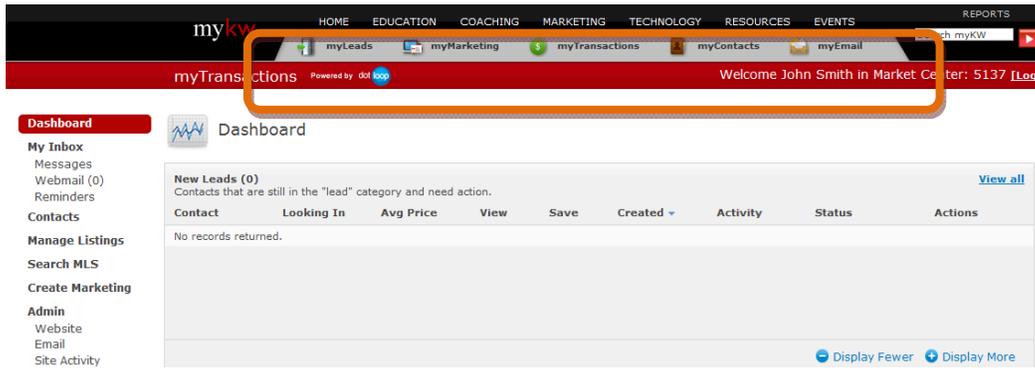
Agent Referral Search

Featured Vendors  
Citi offers support throughout the homebuying

You have simple button controls linking to the modules of eEdge. Prominently displayed alerts indicate necessary actions. So, for example, the myLeads icon will notify you of any new leads captured, the myMarketing icon will prompt you to prepare marketing materials for new listings and the myTransactions icon will display any actions required during the contract process. From your control panel, you always have direct access straight into your contacts and email.

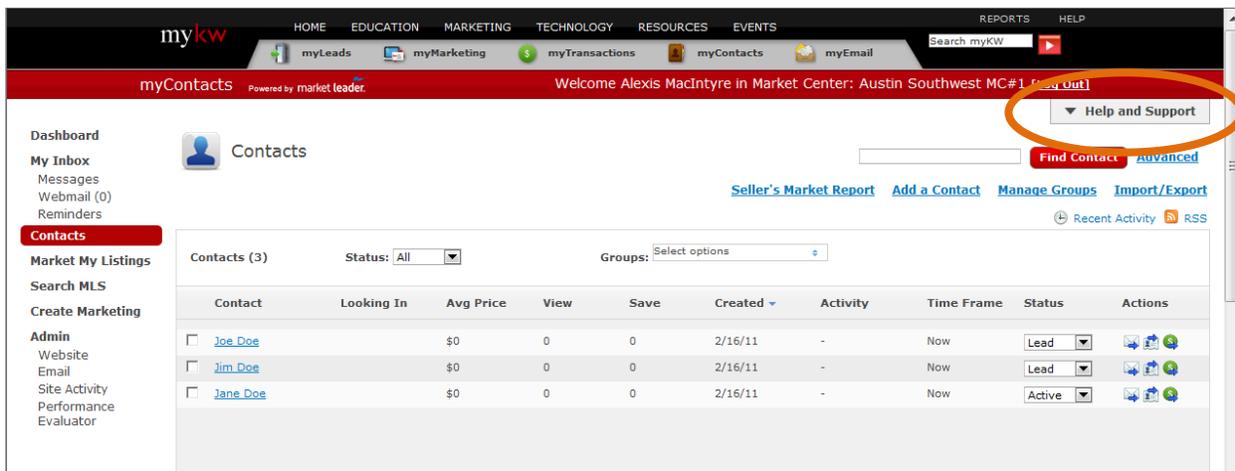
**Important Note:** myTransactions will be rolling out regionally. To see when your region is scheduled to go-live visit the eEdge page on myKW.

Each of the eEdge modules is integrated with the others. So, for example, when you create marketing for a listing, the information is automatically pre-populated from myContacts. From myContacts, you can open up the current e-Transaction right from the contact record in one click. No matter where you are in the eEdge system, you will also always find easy access to any other eEdge module through the top toolbar.



### If You Need Help

As you learn the eEdge system, eEdge Support is always here to help! You'll find easy links to resources, training, and live support on any screen of eEdge.



### ***5 Daily eEdge Actions***

There's a lot of functionality in eEdge that you can take advantage of! But get started quickly each day by completing the 5 Daily eEdge Actions:

1. Login to your eEdge account every morning and evening.
2. Respond to New Leads and update their Status.
3. Reply to new email from Contacts. Don't forget to check your Webmail too!
4. Take action on current Reminder! Be sure to setup future Reminders!
5. Prepare any marketing material for new listings or listing appointments.

And, once you launch myTransactions in your region, there's a sixth!

6. Check myTransactions and address any notifications.



## Lesson 2: Activating eEdge

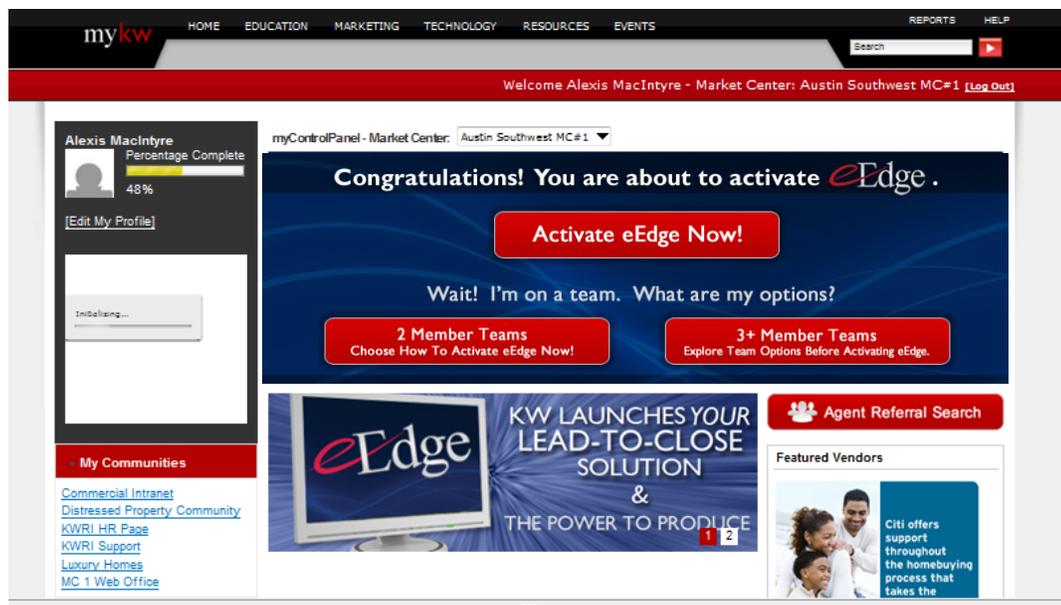
## Activating eEdge



Are you on a team? Teams will have unique considerations. Before any members of the team activate their account, it is critical you review the Team Options at the end of this lesson.

Congratulations! You're ready to get started in eEdge. First, you'll need to activate your account. To do so:

1. Log into mykw.kw.com. Click **Activate eEdge Now**.



The screenshot shows the mykw.kw.com user dashboard. At the top, there is a navigation bar with links for HOME, EDUCATION, MARKETING, TECHNOLOGY, RESOURCES, and EVENTS. A search bar is located on the right. Below the navigation bar, a red banner displays the user's name, Alexis MacIntyre, and their Market Center, Austin Southwest MC#1, with a [Log Out](#) link. The main content area is divided into several sections. On the left, there is a profile card for Alexis MacIntyre showing a 48% completion rate for the eEdge activation, with an [\[Edit My Profile\]](#) link. Below this is a section for **My Communities** with links to Commercial Intranet, Distressed Property Community, KWRI HR Page, KWRI Support, Luxury Homes, and MC 1 Web Office. The central part of the dashboard features a large blue banner with the text "Congratulations! You are about to activate eEdge." and a prominent red button labeled "Activate eEdge Now!". Below this banner, there is a section titled "Wait! I'm on a team. What are my options?" with two red buttons: "2 Member Teams Choose How To Activate eEdge Now!" and "3+ Member Teams Explore Team Options Before Activating eEdge.". To the right of this section is a red button for "Agent Referral Search". Below the team options, there is a promotional banner for "KW LAUNCHES YOUR LEAD-TO-CLOSE SOLUTION & THE POWER TO PRODUCE" featuring the eEdge logo and a computer monitor. On the far right, there is a "Featured Vendors" section with a Citi advertisement.

2. Click **Get Started with eEdge**. (If you are on a team, be sure to first decide which option will best suit your team's needs.)



**Congratulations! You are about to activate eEdge in your business!**

Are you an individual agent?	Are you a member of a 2-person team?	Are you a member of a larger team?
<p><b>You Are Ready to Activate!</b></p>	<p><b>Option 1:</b> Each team member activates eEdge as an individual agent.</p> <p><b>Option 2:</b> One agent activates eEdge and shares account (2 MLS IDs allowed.)</p>	<p>Talk to the lead agent of your team about configuring your team accounts <b>before activating</b> your eEdge account.</p> <p><b>Option 1:</b> Each team member activates eEdge as an individual agent (no shared CRM).</p> <p><b>Option 2:</b> RealtyGenerator by Market Leader is an add-on to eEdge for teams. Contact Market Leader at (800)-985-0469 or <a href="#">click here</a> to learn more. (\$200/mo. savings for KW associates only)</p>



3. Click to continue with eEdge setup. If you choose, you may also take advantage of the add-ons Market Leader offers in the Professional edition or with Realty Generator. This is not required and you may always choose the system add-ons at a later date. If you are part of a team, review the Team Options guide at the back of this lesson for more detail.

4. Complete all required information. For Contracting Party field, enter your own name.

THE PRODUCT AGREEMENT (AGREEMENT) IS A SEPARATE AGREEMENT BETWEEN THE INDIVIDUAL OR LEGAL ENTITY ("CLIENT") SUBSCRIBING FOR USE OF THE MARKET LEADER PRODUCT AND MARKET LEADER, LLC. ("MARKET LEADER"). PLEASE READ THIS AGREEMENT CAREFULLY BEFORE AGREEING TO THESE TERMS. BY AGREEING TO THESE TERMS OR USING THE MARKET LEADER PRODUCT, WHICHEVER OCCURS EARLIER, CLIENT IS AGREEING TO BE BOUND BY THE TERMS OF THIS AGREEMENT

**1. Subscription to Market Leader Product.**  
Client hereby agrees to license the Market Leader real estate sales prospect cultivation and management tools (consisting of a hosted real estate website and integrated CRM tools) as described on the web form submitted in conjunction with Client's acceptance of this Agreement (the "Web Form") (the "System"). Client hereby also agrees to purchase real estate advertising services (consisting of advertising to be purchased

I agree to the above terms

<p><b>Contact Information</b></p> <p>Name <input type="text" value="Alexis MacIntyre"/></p> <p>Office Phone Number <input type="text" value="512-448-4222x123"/></p> <p>Email Address <input type="text" value="test@kw.com"/></p> <p>Company <input type="text"/></p> <p>Contracting Party <input type="text"/></p>	<p><b>Mailing Address</b></p> <p>Address <input type="text" value="807 Las Cimas Parkway Sui"/> Unit <input type="text"/></p> <p>City <input type="text" value="Austin"/></p> <p>State/Province <input type="text" value="TX"/> Zip/Postal Code <input type="text" value="78746"/></p> <p>Country <input type="text" value="Country..."/></p>
--	---

**Signature**

By typing your name in the signature box you agree that you are (or by typing your name in the signature box on behalf of a legal entity, you agree that such entity is) legally bound by our Agreement, including the Terms and Conditions, pricing information and other provisions above.

5. Complete your website setup. Your eEdge website serves as an additional lead source and capture system for you. You are also provided with an email address that will allow you to track all correspondences within the eEdge system (for more, see subsequent lessons).

- a) Enter the primary zip code in which you conduct business.
- b) Decide your eEdge subdomain. This will be the link for your eEdge website. Be sure you **DO NOT** enter www or http into the field.
- c) What you decide for your eEdge subdomain will also be your eEdge email address.
- d) Click **Finish Setup**.

2 Website Setup

You are almost done!

Please provide a few more details so we can enable your site.

**Complete Site Setup**  
Your site will be active when the following information is provided:

Enter the zip code of an area or neighborhood that you service

Enter Desired SubDomain  .kwrealty.com

New Market Leader Email  @kwrealty.com

**Finish Setup**

*Congratulations, you're now ready to begin using eEdge!*



**Congratulations** Your Site Setup is Complete!

You are now ready to get started with your new Market Leader system.

**Next Steps:**

Remember that you can access all your eEdge tools (and any Market Leader upgrades you may have chosen) via your myKW Control Panel using your Keller Williams Realty username and password at <http://mykw.kw.com>.

We look forward to supporting your success!

**The Market Leader Team**

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## eEdge for Teams

**Teams of two agents may have their own accounts or share one eEdge account.**

### Option 1

If you are on a two-person team and choose to have individual eEdge accounts:

- Members of the team maintain individual eEdge websites and eEdge email addresses.
- Members of the team maintain separate lead flows, databases, marketing portfolios and transactions
- Choose this set-up if you book your production separately

### Option 2

If you are on a two-person team and choose to share one eEdge account:

- Members of the team choose a “lead agent” who will activate on eEdge
- Within the eEdge website admin tool, agents add both MLS IDs to pull both listings
- Members of the team share an eEdge website, eEdge email address, lead flow, database, marketing portfolio via the “lead agent’s” account
- Choose this set-up if you book all your production under one “lead agent”

**Teams of three or more agents may have their own accounts or share one eEdge account.**

If you are the lead agent of a three-person or larger team, you will want to advise your team on how you'd like to configure the team accounts.

If you are a member of a three-person or larger team, consult with your lead agent before activating on eEdge for a decision on how the team will configure the team's eEdge account(s).

### Option 1

All team members have their own eEdge accounts:

- Members of the team maintain individual eEdge websites and eEdge email addresses.
- Members of the team maintain separate lead flows, databases, marketing portfolios and transaction documents and records

### Option 2

If you are on a large team and you would like to have a shared database and team dashboard, Keller Williams Realty has a KW-exclusive (\$500/mo. savings) on Market Leader's RealtyGenerator product which is fully eEdge-compatible and includes the Professional Edition of Market Leader for all team members.



## Lesson 3: eEdge Set-Up

## Your eEdge Website

Your eEdge website is an additional lead capture source for you. You will be able to use this website in conjunction with any other websites you currently use.

The screenshot displays the Keller Williams Realty website's search and navigation interface. At the top left is the Keller Williams Realty logo. To the right, there are links for "Create an account" and "Sign In". Below the logo is a navigation bar with buttons for "Buy", "Sell", "Move", "Meet", and "Contact Us".

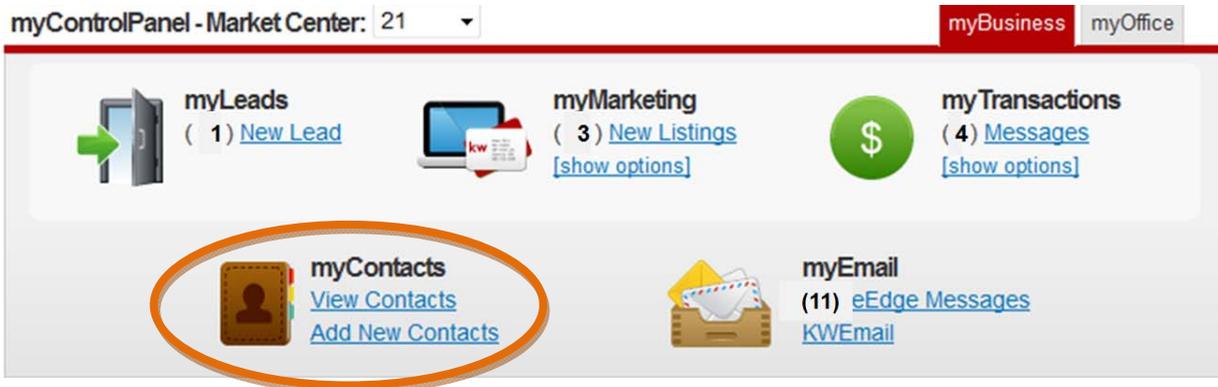
The main content area is divided into several sections:

- Find a Home:** A search form with fields for "Area" (with a placeholder "Enter a city, neighborhood, or zip"), "Property Type" (set to "All Types"), "Price" (with "Min" and "Max" input fields), "Beds" (set to "Any"), and "Baths" (set to "Any"). There are "Search" and "Save" buttons, and a link for "more options".
- Featured Listing:** A large image of a house with a stone facade. Below the image, the listing details are: "1908 Sea Eagle", "Austin, TX 78738", "\$685,000", "Beds: 4", "Baths: 4", "Sq Ft: 3957", "MLS #: 4652923". There are links for "More Information" and "View all our Listings".
- Communities Served:** A list of links for "Austin Central", "Austin Downtown", "Austin Lake Travis", and "Austin Lakeway".
- Your Austin Area Real Estate Connection:** A section with the heading "Your Austin Area Real Estate Connection" and the sub-heading "Get a positive, helpful partner for buying or selling a home:". It lists three bullet points: "Trusted resource for answers about the process", "Innovative marketing strategies", and "Expertise about neighborhood features".
- Why Register?:** A section with the heading "Why Register?" and the sub-heading "You'll get:". It lists two bullet points: "Access to thousands of home listings" and "Email alerts for homes in your".

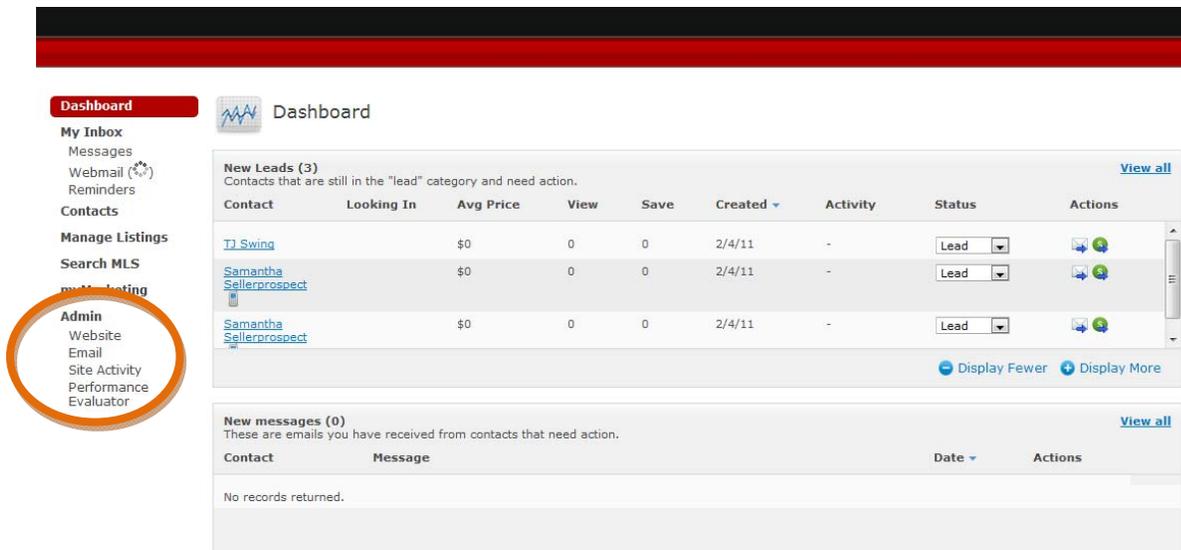
## Access the Admin Page

Before you get started in eEdge, set your administrative settings properly to ensure your leads are directed to you. To access your admin settings:

1. Click on **myContacts** on your control panel.



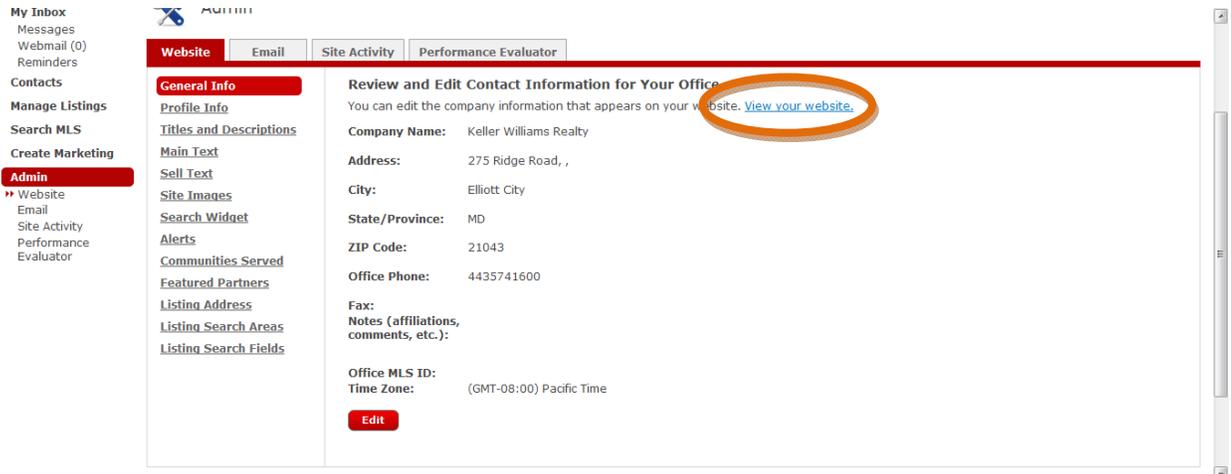
2. From the myContacts dashboard, you'll see your **Admin** settings in the left hand navigation.



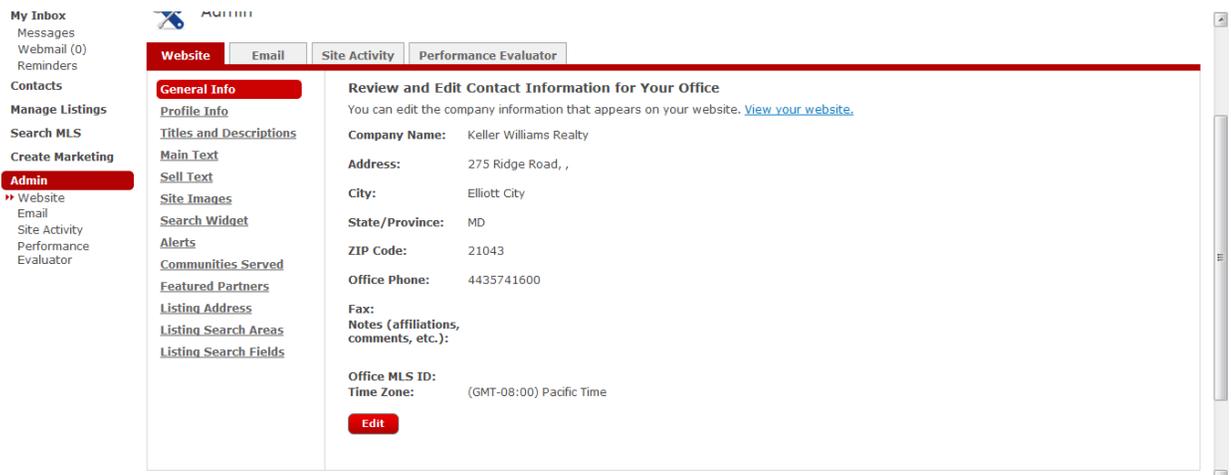
## Your Website Settings

Your eEdge website is ready to go with just a few small updates!

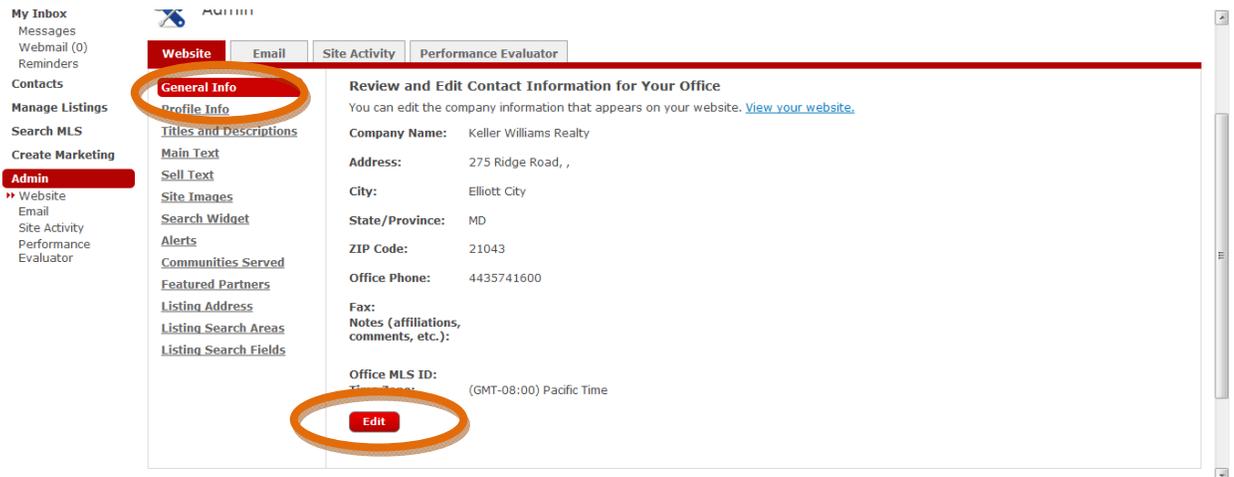
1. At any time, you can preview your website by clicking on “View your website” link. Do this often as you make changes so you can see how they affect your site.



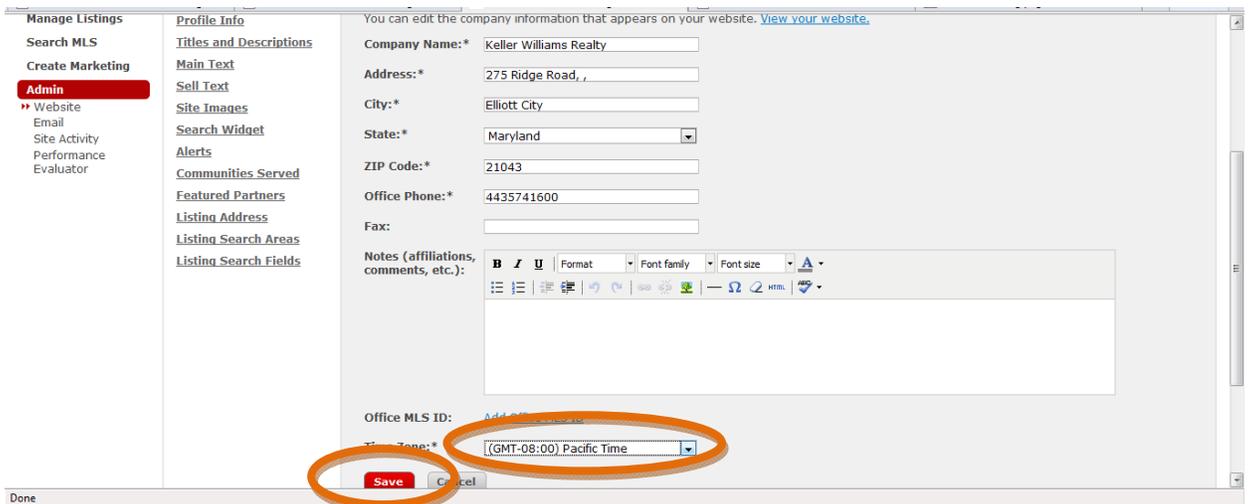
2. Ensure your office information is correct and make any necessary updates by clicking **Edit**.



3. Update your time zone (if you are not in the Pacific time zone).
  - a) Under General Info, click **Edit**.

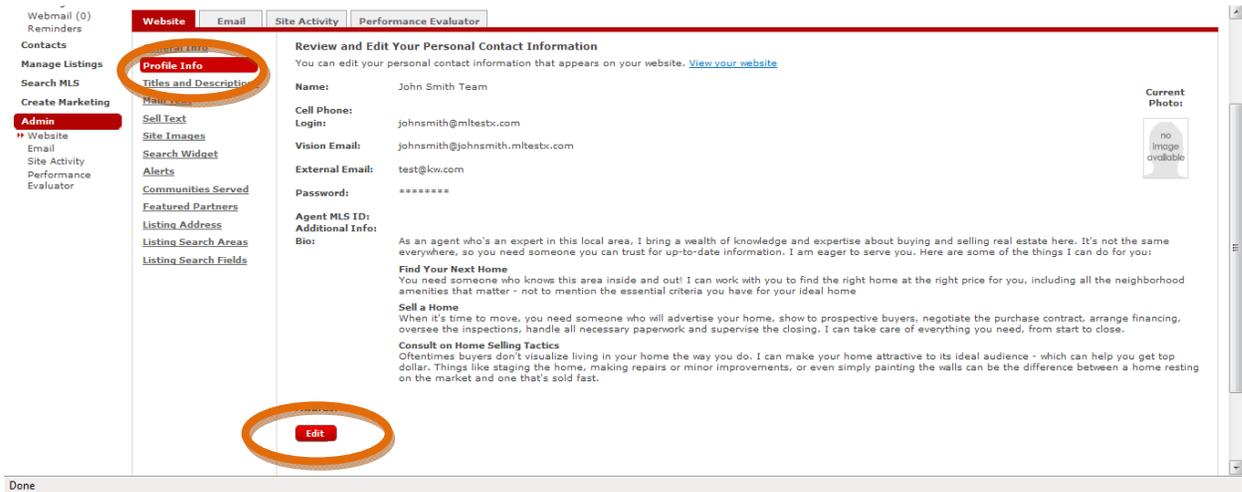


b) Choose the correct time zone and click Save.

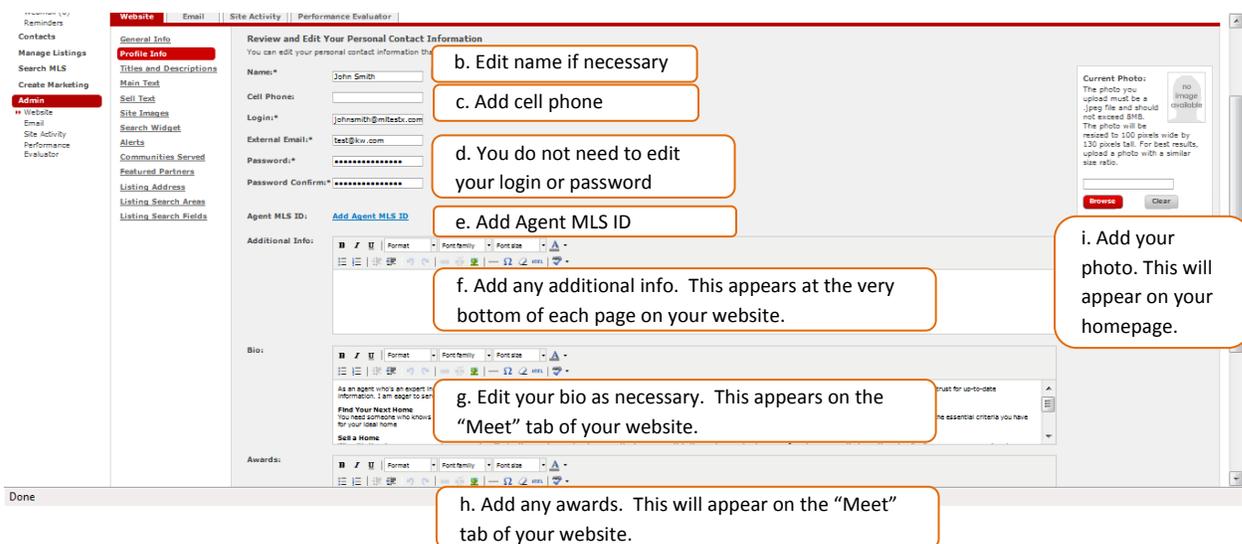


5. Update your profile.

a) Choose Profile Info and click Edit.



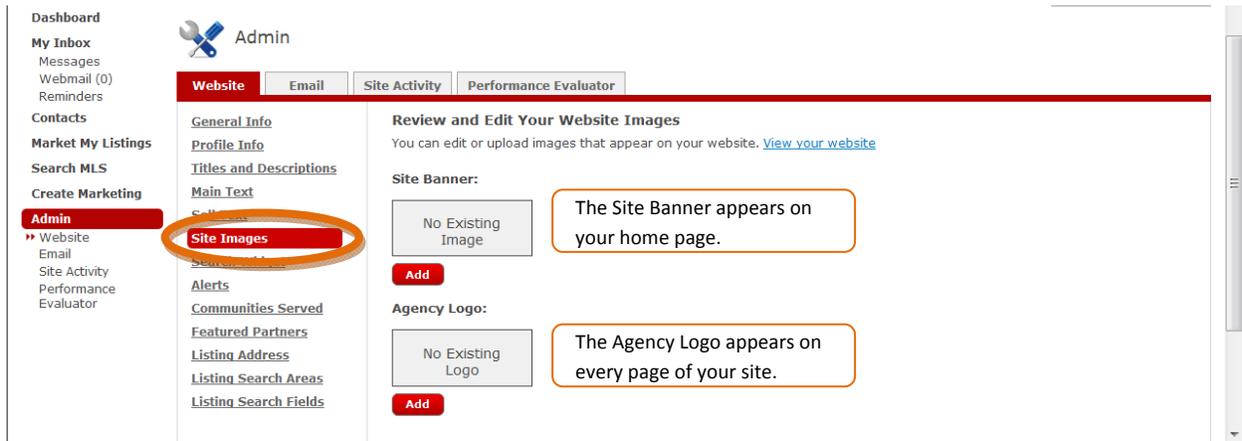
- b) Edit your name if necessary.
- c) Add your cell phone number.
- d) You do not need to edit your login or password.
- e) Add your Agent MLS ID. This will ensure your eEdge website properly displays your listings.
- f) Enter any additional info, if desired.
- g) Edit your bio.
- h) Add any awards, if desired.
- i) Add your photo.



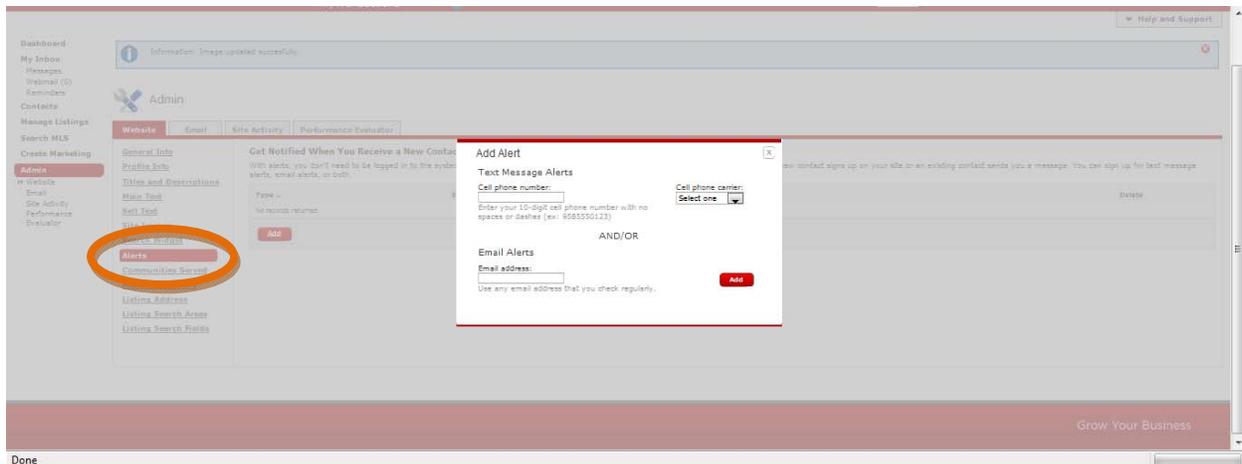
6. Update the Main Text, if desired.

7. Update the Sell Text, if desired.

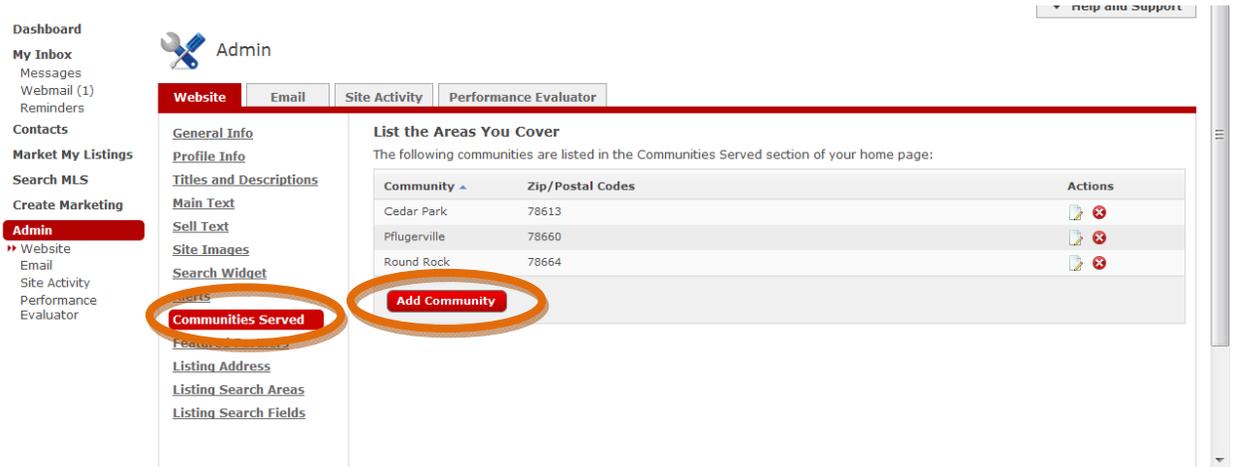
8. Add a site banner image and agency logo.



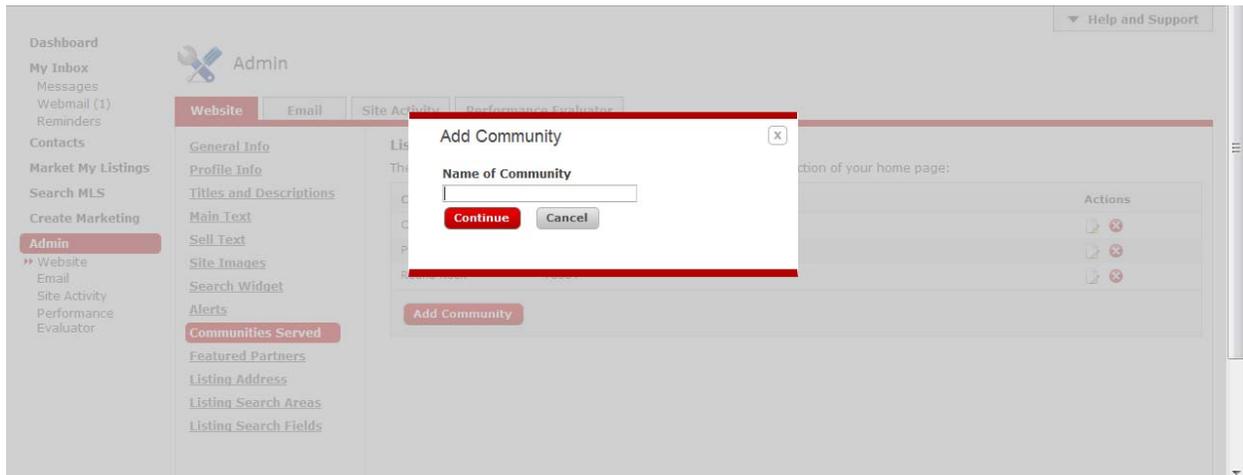
9. Set your alerts. The alerts notify you whenever you receive a new lead or a new email message through the system.
  - a) Choose alerts in the left-hand menu.
  - b) Enter the cell-phone number and email you want alerts sent to. You may choose up to three places to send alerts.



10. Add your Communities Served.
  - a) Click on Communities Served and Add Community.

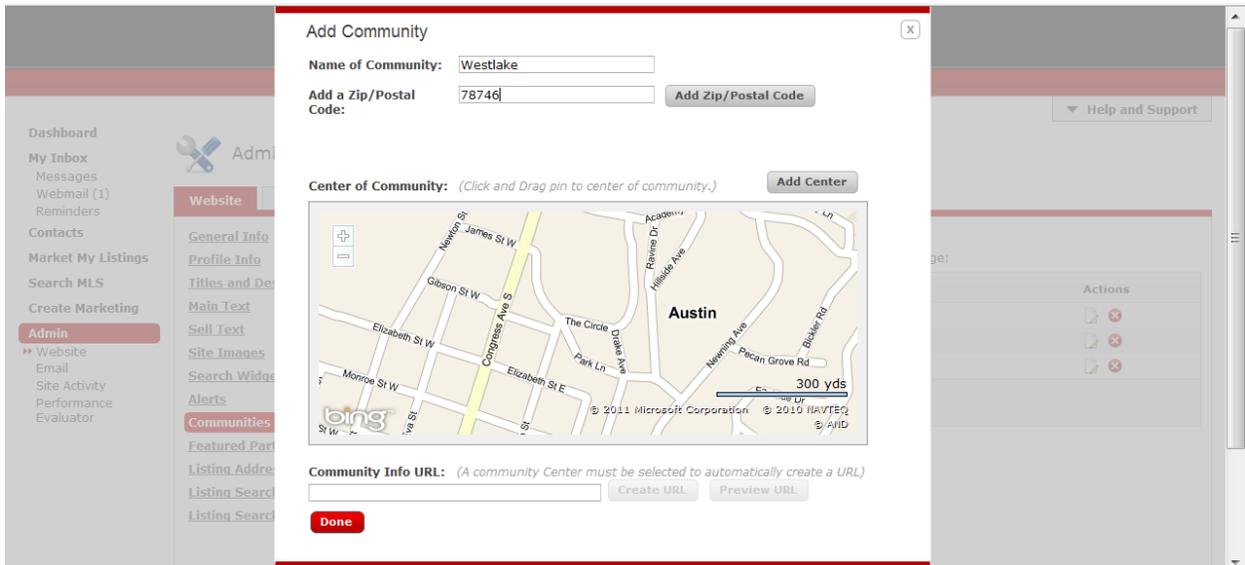


b) Enter the name of your community.

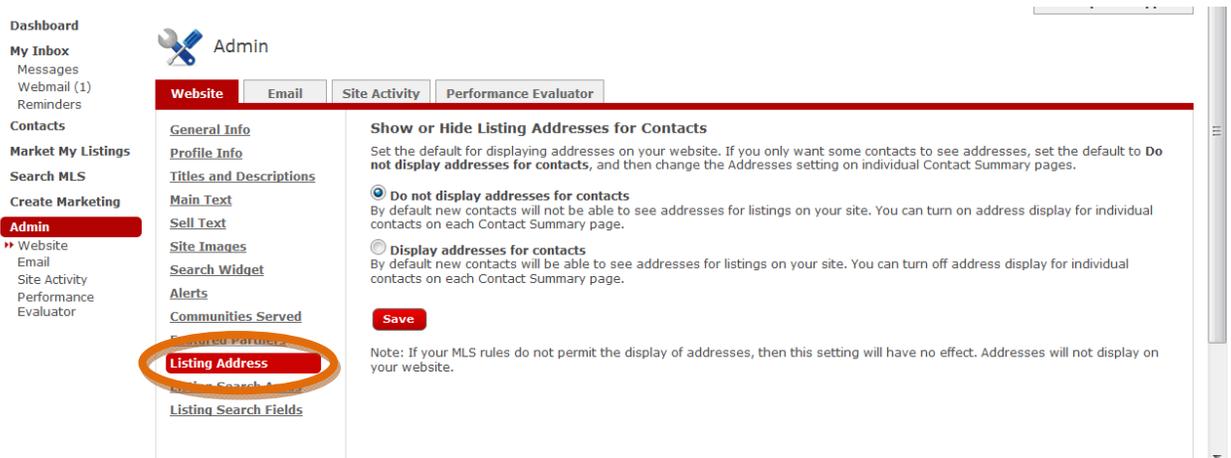


c) Add the zip code.

d) If desired, add the center of the community and a link to a community site for more information.



### 11. Set your Listing Address setting.

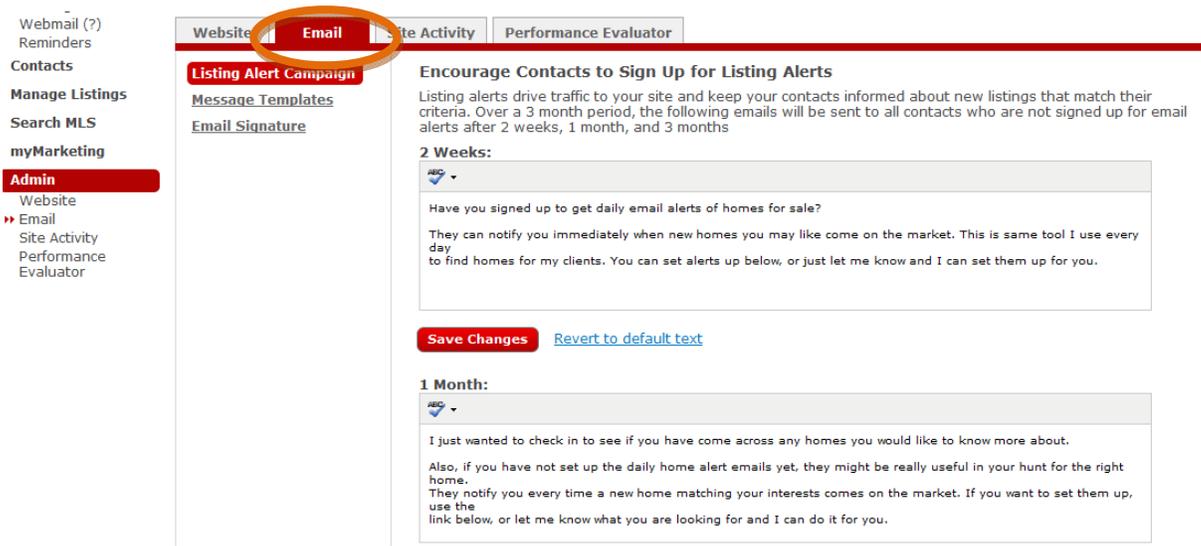


## Your Email Settings

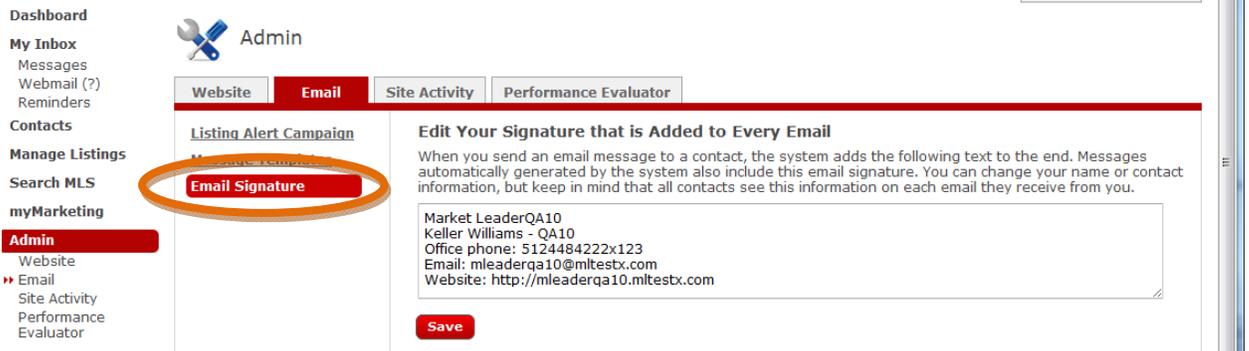
1. **Listing Alert Campaign** - allows you to customize the messages that will be sent at 2-weeks, 1-month and 3-months to all contacts who are not signed up for email alerts (with the exception of those who are marked with Hot, Sold or Trash status).

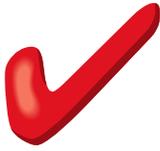
a) Choose the Email tab.

b) Customize the email alerts as desired and click **Save Changes**.



2. **Email Signature** allows you to customize the email signature that will be included on any emails automatically generated from the system. Change your email signature, if desired, and click **Save**.





## Your Turn!

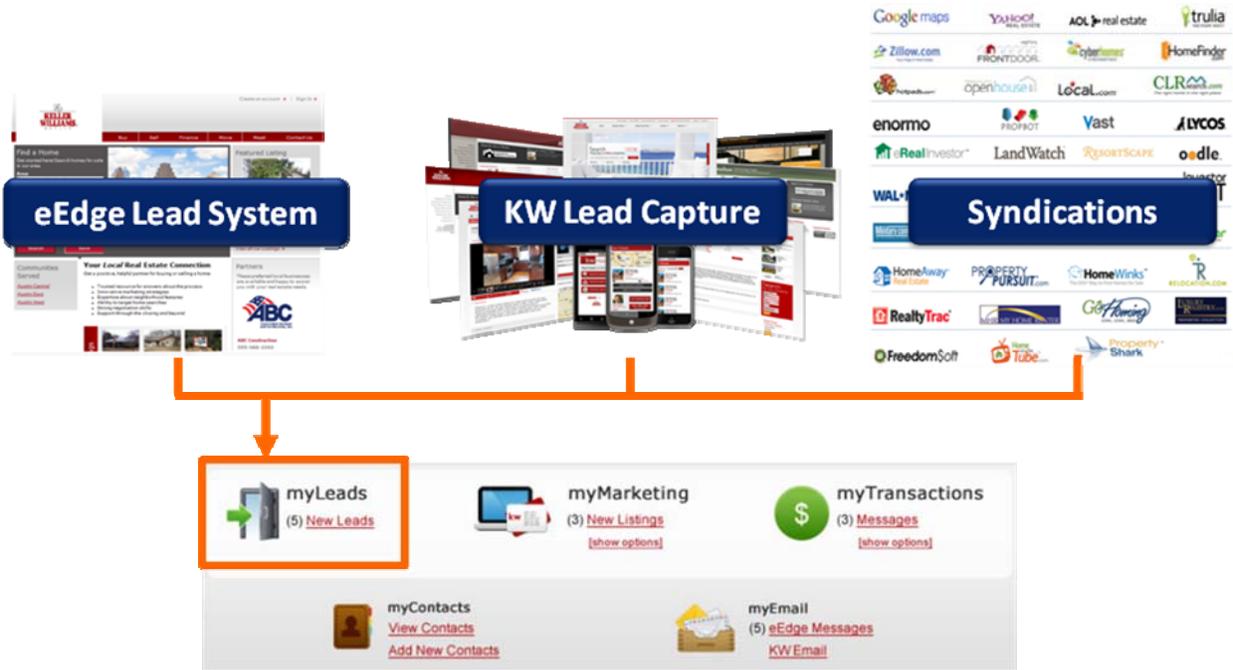
**Update your website settings now.  
View your website regularly as you adjust your settings  
so you can see the effect of your updates.**



## Lesson 4: myLeads

## How Leads are Routed to You

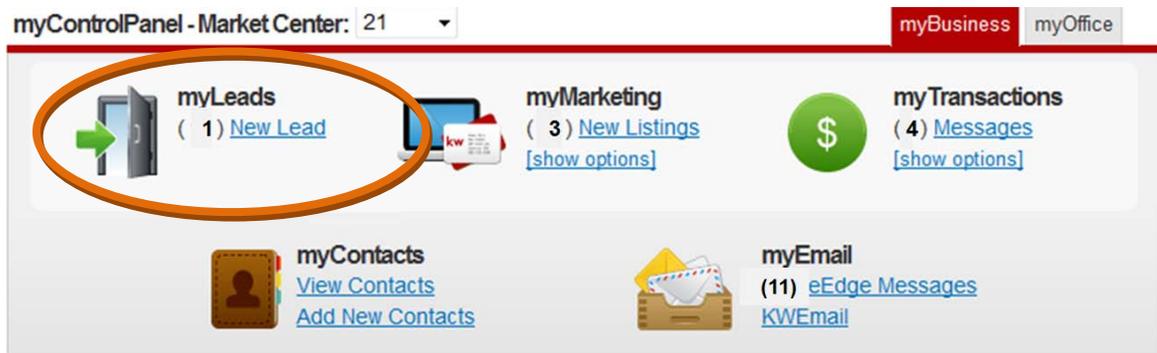
Leads come in to your eEdge Control Panel from a number of different sources. You will receive leads from your eAgentC website and your eEdge website. You will also receive leads from the 40+ additional eAgentC sources. These include all the sites that the KWLS syndicates:



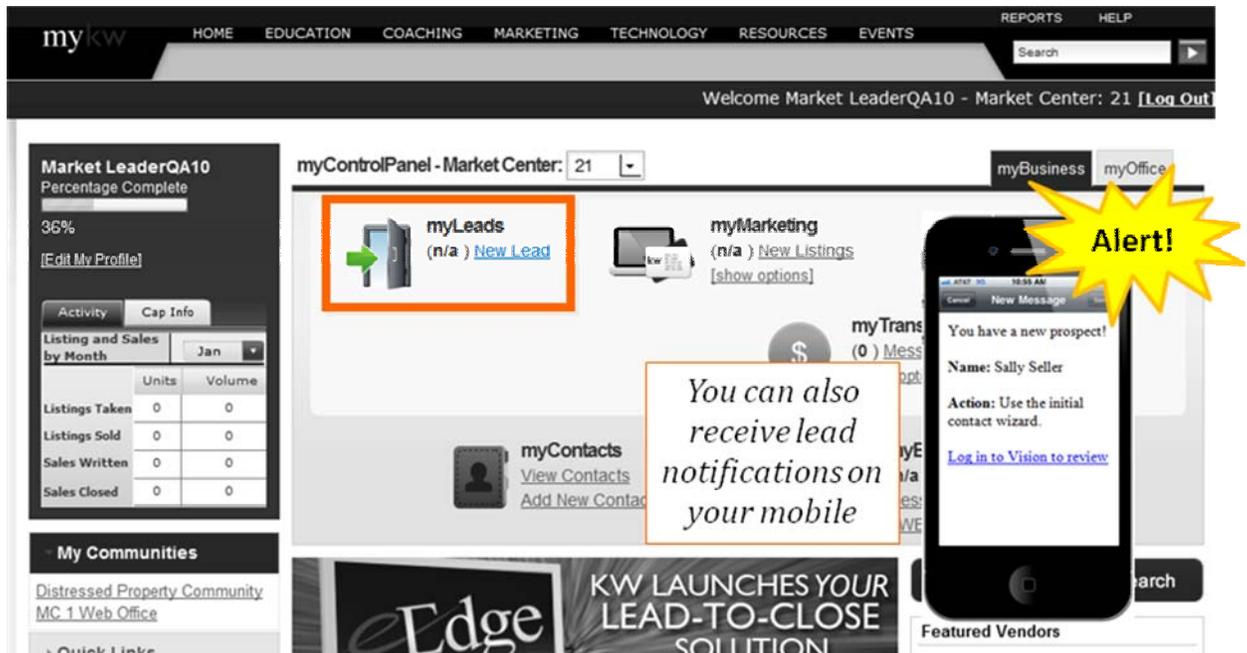
## Lead Notifications

You will be notified of new leads in three ways.

1. Check the control panel for Lead Notifications.

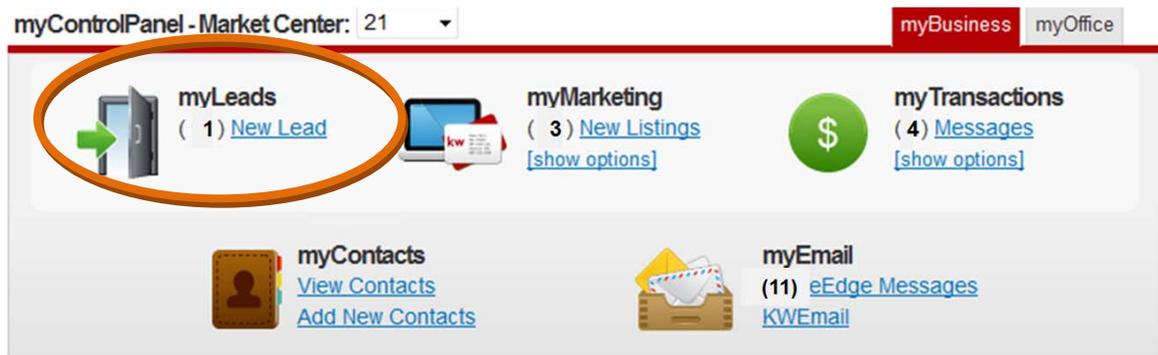


2. Via email and/or
3. Via text message (provided you have opted-in - see the Admin Settings lesson).

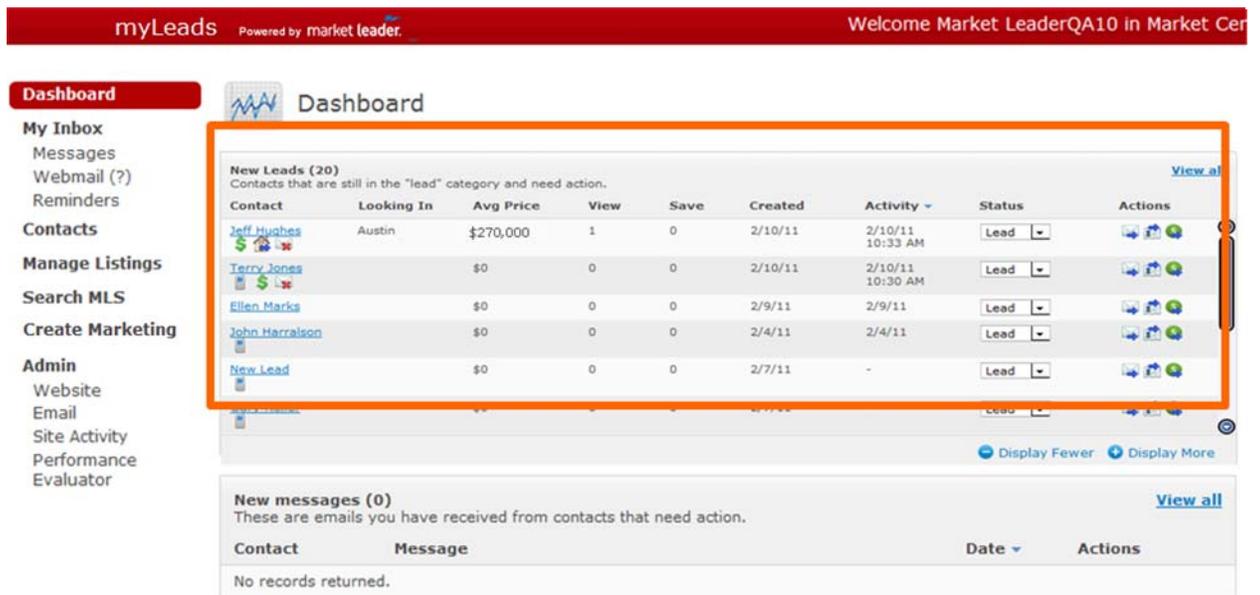


## The myLeads Dashboard

1. Click on the **myLeads** module of your eEdge Control Panel to access the myLeads dashboard.



2. New leads that require action are listed at the top. A summary of the information collected at lead capture is included.



3. Note that right on your leads dashboard, you also have access to your recent messages from contacts and any current reminders.

**Dashboard**

**New Leads (12)**  
Contacts that are still in the "lead" category and need action.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
<a href="#">Jeff Hughes</a>	Austin	\$0	1	0	2/10/11	2/10/11 10:33 AM	Lead	
<a href="#">Terry Jones</a>		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead	
<a href="#">Ellen Marks</a>		\$0	0	0	2/9/11	2/9/11 3:44 PM	Lead	
<a href="#">John Harralson</a>		\$0	0	0	2/4/11	2/4/11	Lead	
<a href="#">New Lead</a>		\$0	0	0	2/7/11	-	Lead	
<a href="#">Gary Keller</a>		\$0	0	0	2/7/11	-	Lead	

**New messages (0)**  
These are emails you have received from contacts that need action.

Contact	Message	Date	Actions
No records returned.			

**Upcoming Reminders (1)** [Add a new reminder](#)

Contact	Reminder	Due Date	Type	Actions
<a href="#">Jeff Hughes</a>	Jeff Hughes has just setup a listing alert. We recommend you review their listing alert criteria to ensure they are reasonable for the area.	2/13/11	System	

### Responding to Leads

1. The instant a lead registers, he or she is sent an immediate notification email and you are notified.
2. Click the lead's name to initiate contact.

myLeads Powered by market leader. Welcome Market LeaderQA10 in Market Cer

**Dashboard**

**New Leads (20)**  
Contacts that are still in the "lead" category and need action.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
<a href="#">Jeff Hughes</a>	Austin	\$270,000	1	0	2/10/11	2/10/11 10:33 AM	Lead	
<a href="#">Terry Jones</a>		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead	
<a href="#">Ellen Marks</a>		\$0	0	0	2/9/11	2/9/11	Lead	
<a href="#">John Harralson</a>		\$0	0	0	2/4/11	2/4/11	Lead	
<a href="#">New Lead</a>		\$0	0	0	2/7/11	-	Lead	
<a href="#">Gary Keller</a>		\$0	0	0	2/7/11	-	Lead	

**New messages (0)**  
These are emails you have received from contacts that need action.

Contact	Message	Date	Actions
No records returned.			

3. Click to open the Initial Contact Wizard (ICW).

Steve Marshall

[Back to List](#) [Next >](#)

Steve is looking for a \$0 house.

**This is a new contact from your website.**  
Use the Initial Contact Wizard (ICW) to walk you through communicating with this new contact. **According to NAR**, there is a 72% success rate of turning a web contact into a client if live contact is made within the first hour after the contact's visit. After 4 hours, the chance drops to 29%.  
[Open the ICW.](#)

**This contact is looking to sell a house.** Try to get this contact to list with you. You can prepare a [Seller's Market Report](#) to show how you can use your website to effectively market this contact's property.

Summary
Listings - Alerts (0), Saved (0), Viewed (0)
History

Send Listings

**Name:** [Steve Marshall](#)

**Home Phone:**  
🇺🇸 512-555-1212

**Email 1:** [brenda.marshall01@gmail.com](mailto:brenda.marshall01@gmail.com) (Primary)

**eSignature Email:** brenda.marshall01@gmail.com

**Address:**

**Status:** Lead

- Start myTransaction
- Go to Campaigns
- Send Email
- Print
- Export V-Card
- Resend Welcome Email
- Stop System Emails

4. If the lead has provided a phone number, the ICW gives you a script and prompts you to record the call outcome.

### Initial Contact Wizard

**Information:** This prospect was not required to provide a phone number. Because the phone number field on the registration form is optional, the phone number is probably correct. ✕

Call Steve at 🇺🇸 512-555-1212 (home).

**Explain how you obtained Steve's phone number.**  
 Example: *Hi, my name is Market LeaderQA10. I am calling today because you signed up yesterday on my real estate website, mleaderqa10.mltestx.com.*

**Encourage Steve to meet you in person.**  
 Example: *I see you saved a few homes. When would you like to go out and see them in person? I have two slots available: [day and time] or [day and time]. Which time works best for you?*  
 Example: *I noticed you are looking to move to this area. Do you have any house hunting trips planned? I'll be happy to show you a few homes when you come out to visit.*

What was the outcome of this phone call?

- [This contact needs immediate help.](#) Mark this contact as Hot and record that I made this phone call.
- [This contact plans to look for homes later.](#) Mark this contact as Active and create a reminder to call again.
- [This contact was not home.](#) Mark this contact as Retry and create a reminder to call back tomorrow.
- [None of the above.](#) Take me to the contact details page to record what happened.
- [I would rather email this contact.](#)

- You are then given the option to set a reminder for follow-up.

- If the lead has provided only an email address, the ICW will prompt you to send an email.

Steve is looking for a \$0 house.

- Be sure to change the status after you contact the lead. If you do not contact a lead within 12 hours, eEdge will automatically send them an email. eEdge will not automatically change a lead's status – that is only done by you.

**Dashboard**

**My Inbox**  
 Messages  
 Webmail (?)  
 Reminders

**Contacts**

**Manage Listings**

**Search MLS**

**myMarketing**

**Admin**  
 Website  
 Email  
 Site Activity  
 Performance  
 Evaluator

**New Leads (4)**  
 Contacts that are still in the "lead" category and need action. [View all](#)

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
<a href="#">Steve Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:48 AM	Lead	
<a href="#">Brenda Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:45 AM	Lead	
<a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	Lead	

**New messages (0)**  
 These are emails you have received from contacts that need action. [View all](#)

Contact	Message	Date	Actions
No records returned.			

- If you cannot service a lead yourself, you may choose to transfer it.

**Dashboard**

**My Inbox**  
 Messages  
 Webmail (?)  
 Reminders

**Contacts**

**Manage Listings**

**Search MLS**

**Create Marketing**

**Admin**  
 Website  
 Email  
 Site Activity  
 Performance  
 Evaluator

**New Leads (12)**  
 Contacts that are still in the "lead" category and need action. [View all](#)

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
<a href="#">Jeff Hughes</a>	Austin	\$0	1	0	2/10/11	2/10/11 10:33 AM	Lead	
<a href="#">Tarry Jones</a>		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead	
<a href="#">Ellen Marks</a>		\$0	0	0	2/9/11	2/9/11 3:44 PM	Lead	
<a href="#">John Harralson</a>		\$0	0	0	2/4/11	2/4/11	Lead	
<a href="#">New Lead</a>		\$0	0	0	2/7/11	-	Lead	
<a href="#">Gary Keller</a>		\$0	0	0	2/7/11	-	Lead	

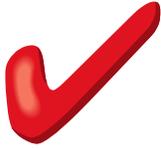
**New messages (0)**  
 These are emails you have received from contacts that need action. [View all](#)

Contact	Message	Date	Actions
No records returned.			

**market leader**  
 PROFESSIONAL EDITION  
 Get Valuable Enhancements to eEdge  
 More Listings  
 More Leads  
 More Deals  
[Learn More](#)

- You'll now notice that the leads you contacted are no longer in your myLeads dashboard, they have been moved to myContacts.

## Your Turn!



1. Go to your eEdge website.
2. Register yourself as a seller lead with your personal email address.
3. Access the notification via your email or text.
4. Click on the lead and go through the ICW process.





## Lesson 5: myContacts

## Your myContacts Dashboard

1. Log into mykw.kw.com and click on **myContacts > View Contacts** on your Control Panel.

Market LeaderQA10  
Percentage Complete  
36%  
[Edit My Profile]

Activity Cap Info

Listing and Sales by Month		Jan
	Units	Volume
Listings Taken	0	0
Listings Sold	0	0
Sales Written	0	0
Sales Closed	0	0

My Communities  
Distressed Property Community

myControlPanel - Market Center: 21

myBusiness myOffice

myLeads ( 1 ) [New Lead](#)

myMarketing ( 3 ) [New Listings](#)  
[show options]

myTransactions ( 4 ) [Messages](#)  
[show options]

myContacts  
[View Contacts](#)  
[Add New Contacts](#)

myEmail (11) [eEdge Messages](#)  
[KWEmail](#)

Agent Referral Search

Featured Vendors

KW LAUNCHES YOUR LEAD-TO-CLOSE SOLUTION

a.kw.com...

2. When you open your myContacts dashboard you will have instant access to new leads, new messages and current reminders.

Dashboard

My Inbox  
Messages  
Webinars  
Reminders

Contacts  
Manage Listings  
Search MLS  
myMarketing  
Admin  
Website  
Email  
Site Activity  
Performance  
Evaluator

**New Leads (4)**  
Contacts that are still in the "lead" category and need action. [View all](#)

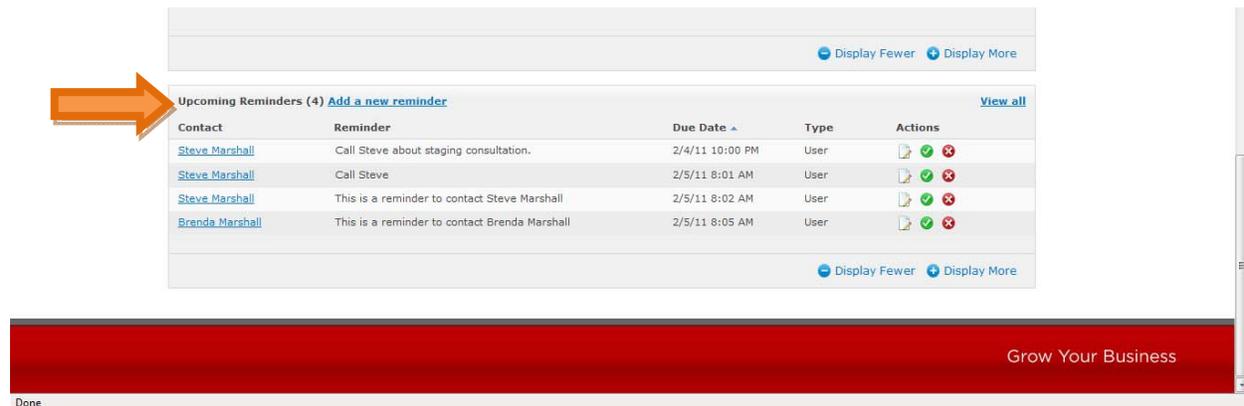
Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
<a href="#">John Harralson</a>		\$0	0	0	2/4/11	2/4/11 3:03 PM	Lead	
<a href="#">TJ Swing</a>		\$0	0	0	2/4/11	-	Lead	
<a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	Lead	

Display Fewer Display More

**New messages (0)**  
These are emails you have received from contacts that need action. [View all](#)

Contact	Message	Date	Actions
No records returned.			

Done



Upcoming Reminders (4) [Add a new reminder](#) [View all](#)

Contact	Reminder	Due Date	Type	Actions
<a href="#">Steve Marshall</a>	Call Steve about staging consultation.	2/4/11 10:00 PM	User	
<a href="#">Steve Marshall</a>	Call Steve	2/5/11 8:01 AM	User	
<a href="#">Steve Marshall</a>	This is a reminder to contact Steve Marshall	2/5/11 8:02 AM	User	
<a href="#">Brenda Marshall</a>	This is a reminder to contact Brenda Marshall	2/5/11 8:05 AM	User	

Grow Your Business

Done

## Importing Contacts

Before you get started, take time to clean up your current database before doing a bulk import into eEdge so you have the cleanest, most effective book of business possible. Continue using any existing CRM software and become familiar with the eEdge system before doing a bulk import (new leads will be funneling into the system to help them get started and familiar with the system).

*Important Note! Through our user group, we identified great enhancements to the import process that will capture even more of the contact-specific information you may have today. This enhanced capability will be available in the coming weeks.*

You can import up to 500 contacts a day. We recommend uploading them in groups as you get started in eEdge. This will allow for a smooth transition into the system. In April, the process below will be replaced with an Easy Wizard which will allow you to simply and quickly import your contacts into the system.

**If you encounter issues in uploading your contacts, contact eEdge support.**

To import your contacts:

1. Export your contacts from your existing contact management system into a \*.csv file. The process for doing so will vary depending on the current system you are using. Refer to your current system's documentation for the how-to.
2. Open your \*.csv file in excel. Clean up the file to ensure the data is in the exact order shown below and there is not any extraneous information. From left to right, include a column for First Name, Last Name, Home Phone, Work Phone, Cell Phone, Address 1, City 1, State 1, Zip 1, Address 2, City 2, State 2, Zip 2, Address 3, State 3, Zip 3, Email Address 1, Email Address 2, Email Address 3, Password. Be sure you have all columns in your spreadsheet, even if you do not have data in them. **In order to import a contact you MUST have a first name, last name, and email address.**

1	First Name	Last Name	Home Phone	Work Phone	Cell Phone	Address 1	City 1	State 1	Zip 1	Address 2	City 2	State 2	Zip 2	Address 3	City 3	State 3	Zip 3	Email Address 1	Email Address 2	Email Address	Password
2	Alexis	MacIntyre	9834558987			8878 Cuernav	Austin	TX	75081									alexisandtim@gmail.com			
3	Tim	MacIntyre	9897876545			786 Bee Cave	Austin	TX	78746									mactim@yahoo.com			
4	Susan	Rider	8787878789															susanrider7924375@hotmail.com			
5	Jim	Halph	9898989898			19 Circle Way	Bee Cave	TX	87879									ralph2830984238@gmail.com			
6	Grady	Gentride	8898983475			101 Lala Lane	Dallas	TX	75081									lalalalala27349273@gmail.com			
7																					

3. Be sure to delete the header row. Then, save the file as a \*.csv file.
4. Click on **Import/Export** in the myContacts dashboard.

The screenshot shows the myContacts dashboard interface. On the left is a navigation menu with options like Dashboard, My Inbox, Messages, Webmail, Reminders, Contacts, Manage Listings, Search MLS, Create Marketing, and Admin. The main content area is titled 'Contacts' and features a search bar, a 'Find Contact' button, and a navigation menu with 'Seller's Market Report', 'Add a Contact', 'Manage Groups', and 'Import/Export' (circled in orange). A warning message states: 'Remember to change your contact's status from Lead. Please change the status for contacts that you have called or emailed from Lead. Using the right status will make it easier to keep track of your contacts.' Below this is a table of 26 contacts with columns for Contact, Looking In, Avg Price, View, Save, Created, Activity, Time Frame, Status, and Actions. The table lists contacts like Samantha Sellerprospect, Brenda Marshall, Steve Marshall, TJ Swing, and John Harralson.

5. If desired, assign a group to imported contacts. If you have not yet set up contact groups, or don't wish to assign the entire list of contacts you are importing into the same group, you will be able to easily assign groups at a later time.
6. Change the status from "Lead" to "Inactive". (This is very important so that all the imported contacts don't end up on the "myLeads" dashboard.)
7. If you'd like to send a welcome email to the contacts, check the box and compose your message. However, we recommend if you're uploading more than 100 contacts at a time, you do not send a message, or you could be marked as spam!
8. Choose your \*.csv file and click **Import**.

Webmail (?)  
Reminders

**Contacts**

Manage Listings  
Search MLS  
myMarketing  
Admin  
Website  
Email  
Site Activity  
Performance  
Evaluator

**Import Contacts** | Export Contacts | Export Messages

You can import contacts listed in a CSV (comma separated values) file.  
The file must contain data in the following order (fields in **bold** are required): **First Name**, **Last Name**, Home Phone, Work Phone, Cell Phone, Address 1, City 1, State 1, Zip 1, Address 2, City 2, State 2, Zip 2, Address 3, City 3, State 3, Zip 3, **Email Address 1**, Email Address 2, Email Address 3, Password.  
You can import more than one list each day, but the total number of imported contacts for one agent cannot exceed 500 per day.

1. Assign a group to imported contacts

2. Set contact status and create welcome email message

Check here to send welcome email to imported contact.

Thanks for chatting with me today. I have signed you up on my Web site and now you have access to all homes for sale in our MLS, just like I do.

[Revert to default text](#)

3. Select a CSV file to upload

9. If the import goes successfully, you will see the following message.

myKW

HOME EDUCATION COACHING MARKETING TECHNOLOGY RESOURCES EVENTS REPORTS HELP

myLeads myMarketing myTransactions myContacts myEmail

myTransactions Powered by dotloop

Welcome Market LeaderQA10 in Market Center: 21 [Log Out]

Help and Support

Dashboard  
My Inbox  
Messages  
Webmail (?)  
Reminders

**Contacts**

Manage Listings  
Search MLS  
myMarketing  
Admin  
Website  
Email  
Site Activity  
Performance  
Evaluator

**Import Contacts** | Export Contacts | Export Messages

You can import contacts listed in a CSV (comma separated values) file.  
The file must contain data in the following order (fields in **bold** are required): **First Name**, **Last Name**, Home Phone, Work Phone, Cell Phone, Address 1, City 1, State 1, Zip 1, Address 2, City 2, State 2, Zip 2, Address 3, City 3, State 3, Zip 3, **Email Address 1**, Email Address 2, Email Address 3, Password.  
You can import more than one list each day, but the total number of imported contacts for one agent cannot exceed 500 per day.

1. Assign a group to imported contacts

2. Set contact status and create welcome email message

Check here to send welcome email to imported contact.

3. Select a CSV file to upload

Done

Information: Successfully imported 5 prospects. Failed to import 0 prospects.

Contacts > Import

10. If any contacts are not properly imported, you will receive an error message. The most common issues are:

- \*.csv file does not include all the required information (review Step 2)
- the information is not in proper order in the \*.csv file
- the header row has not been deleted in the \*.csv file

myTransactions Powered by dot loop Welcome Market LeaderQA10 in Market Center: 21 [Log Out] Help and Support

Dashboard  
My Inbox  
Messages  
Webmail (?)  
Reminders  
**Contacts**  
Manage Listings  
Search MLS  
myMarketing  
Admin  
Website  
Email  
Site Activity  
Performance  
Evaluator

Contacts > Import

Import Contacts Export Contacts Export Messages

You can import contacts listed in a CSV (comma separated values) file.  
The file must contain data in the following order (fields in **bold** are required): **First Name**, **Last Name**, Home Phone, Work Phone, Cell Phone, Address 1, City 1, State 1, Zip 1, Address 2, City 2, State 2, Zip 2, Address 3, City 3, State 3, Zip 3, **Email Address 1**, Email Address 2, Email Address 3, Password.  
You can import more than one list each day, but the total number of imported contacts for one agent cannot exceed 500 per day.

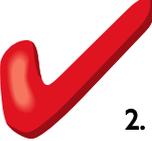
1. Assign a group to imported contacts

2. Set contact status and create welcome email message

Check here to send welcome email to imported contact.

Done

**Your Turn!**



1. Choose 10 contacts from your current system.
2. Follow the directions in this lesson to import them into eEdge. If you get stuck, contact eEdge Support.

## Adding Contacts

1. From the myContacts dashboard, click **Add Contact**. Fill out the contact's information. As with importing, any contacts, a First Name, Last Name and Email Address is required.

There are several status categories you can choose from. We recommend the following:

**Lead** - Leads who've just registered; you have not responded to them yet

**Retry** - Contacts you're trying to engage

**Active** - Contacts who are "just looking" but are interactive

**Inactive** - Contacts who are not currently looking to buy

**Hot** - Contacts who are ready to buy/sell now

**Sold** - Contacts you have just closed

**Trash** - Contacts who wish to be unsubscribed (there is no "delete" option)

Contacts > Add a Contact

Status:

Name:

Home Phone:

Cell Phone:

Work Phone:

Email 1:

Email 2:

Email 3:

eSignature Email:

Address Title:  Address:

City:  State:

Zip:

Timeframe:

Zip Code:

Has Agent?

Has Requested Pre-approval?

Selling Home?

Welcome Email Message:

Created	Activity	Time Frame	Status	Actions
2/4/11	-	Just Looking	Active	
2/4/11	-	Just Looking	Active	
2/4/11	-	Just Looking	Active	
2/4/11	-	Just Looking	Active	
2/4/11	-	Just Looking	Active	
2/4/11	-	Just Looking	Active	

**Your Turn!**

Create three contact records.

## Filtering & Sorting Your Database

Once you have imported or added your contacts, you may view them in your myContacts database.

- To filter by Status or Group, click the drop-down and choose the category you want to sort by. myContacts includes several status types: Lead, Retry, Active, Inactive, Hot, Sold, Trash.

Contacts

Status: All Groups: Select options

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<a href="#">Grady Gentrude</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Jim Halph</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Susan Rider</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Tim Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	

Add Groups Remove Groups

Display Fewer Display More

- You may also sort by any of the columns by clicking on that column header.

Contacts

Status: All Groups: Select options

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<a href="#">Grady Gentrude</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Jim Halph</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Susan Rider</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Tim Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	
<a href="#">Alexis Macintyre</a>		\$0	0	0	2/4/11	-	Just Looking	Active	

Add Groups Remove Groups

Display Fewer Display More

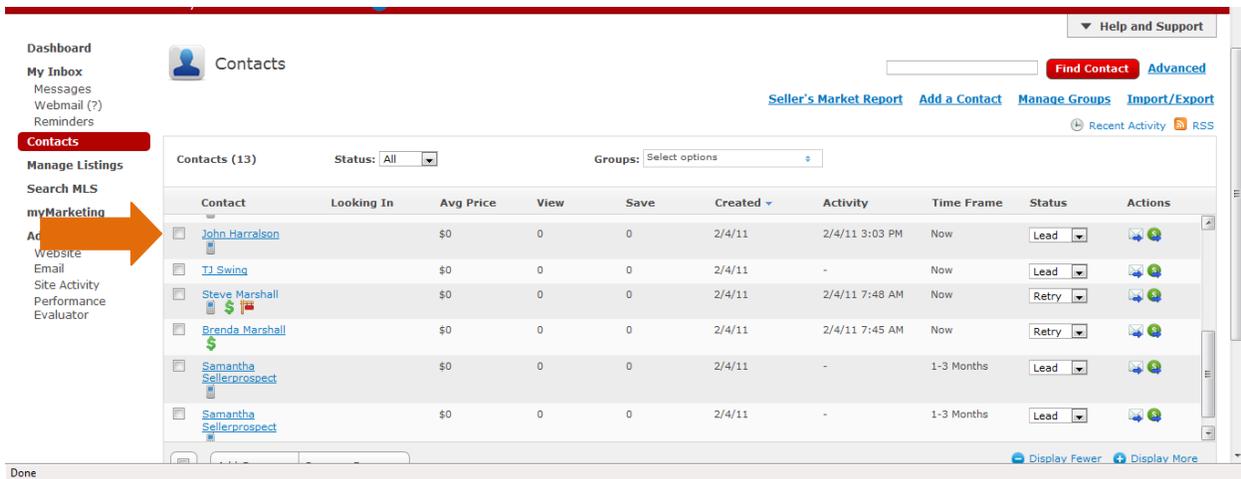


## Your Turn!

- I. Filter your contact records by Status.
- II. Sort contacts by Date Created.

### Viewing Contact Records

- I. To view a contact's information and history, click on their name in the dashboard.



The screenshot shows the 'Contacts' section of a dashboard. On the left is a navigation menu with items like 'Dashboard', 'My Inbox', 'Messages', 'Webmail (?)', 'Reminders', 'Contacts', 'Manage Listings', 'Search MLS', 'myMarketing', 'Ad', 'Website', 'Email', 'Site Activity', 'Performance', and 'Evaluator'. An orange arrow points to the 'myMarketing' item. The main content area is titled 'Contacts' and shows a table with 13 contacts. The table has columns for Contact, Looking In, Avg Price, View, Save, Created, Activity, Time Frame, Status, and Actions. The contacts listed are John Harrelson, TJ Swing, Steve Marshall, Brenda Marshall, and two entries for Samantha Sellerprospect. The 'Status' column has dropdown menus for each contact, with options like 'Lead' and 'Retry'. At the top right of the dashboard, there are links for 'Help and Support', 'Find Contact', 'Advanced', 'Seller's Market Report', 'Add a Contact', 'Manage Groups', 'Import/Export', 'Recent Activity', and 'RSS'. At the bottom of the table, there are 'Display Fewer' and 'Display More' links.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input type="checkbox"/> <a href="#">John Harrelson</a>		\$0	0	0	2/4/11	2/4/11 3:03 PM	Now	Lead	
<input type="checkbox"/> <a href="#">TJ Swing</a>		\$0	0	0	2/4/11	-	Now	Lead	
<input type="checkbox"/> <a href="#">Steve Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:48 AM	Now	Retry	
<input type="checkbox"/> <a href="#">Brenda Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:45 AM	Now	Retry	
<input type="checkbox"/> <a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	1-3 Months	Lead	
<input type="checkbox"/> <a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	1-3 Months	Lead	

2. Their contact record will show all the key information you need to take appropriate action. It will also list any comments, emails, reminders, and groups associated with their contact record.

**Steve Marshall** Back to List < Previous Next >

**This contact is looking to sell a house.** Try to get this contact to list with you. You can prepare a [Seller's Market Report](#) to show how you can use your website to effectively market this contact's property.

**Summary** Listings - Alerts (0), Saved (0), Viewed (0) History Send Listings

**Name:** [Steve Marshall](#)

**Home Phone:** 512-555-1212

**Email 1:** [steve\\_marshall@gmail.com](mailto:steve_marshall@gmail.com) (Primary)

**eSignature Email:** steve\_marshall@gmail.com

**Address:**

**Status:** Retry

**Timeframe:** Now **Moving From:**

**Created:** 2/4/11 9:46 AM **Looking In:**

**Source:** Search Engine Optimization **Has Agent?** No

**Last Action:** 2/4/11 9:48 AM **Has Requested Pre-approval?** Yes

**Eligible for Alerts?** Yes **Has Mortgage Lender?** No

**Eligible for System Emails?** Yes **Selling Home? Listing Addresses?** Yes Off

**Recommendations**

- This contact has a home to sell. Call or email this contact to offer your services as a selling agent and to schedule a listing presentation.

[Show All](#)

- Comments
- Emails
- All Reminders
- Groups

**Current Reminders**

- 2/5/11 12:00 AM**  
Call Steve about staging consultation.  
Source: User
- 2/5/11 10:01 AM**  
Call Steve  
Source: User

3. Set a reminder to take action by choosing Add a Reminder,

**Steve Marshall** Back to List < Previous Next >

**This contact is looking to sell a house.** Try to get this contact to list with you. You can prepare a [Seller's Market Report](#) to show how you can use your website to effectively market this contact's property.

**Summary** Listings - Alerts (0), Saved (0), Viewed (0) History Send Listings

**Name:** [Steve Marshall](#)

**Home Phone:** 512-555-1212

**Email 1:** [brenda\\_marshall01@gmail.com](mailto:brenda_marshall01@gmail.com)

**eSignature Email:** brenda\_marshall01@gmail.com

**Address:**

**Status:** Retry

**Timeframe:** Now **Moving From:**

**Created:** 2/4/11 7:46 AM **Looking In:**

**Source:** Search Engine Optimization **Has Agent?** No

**Last Action:** 2/4/11 7:48 AM **Has Requested Pre-approval?** Yes

**Eligible for Alerts?** Yes **Has Mortgage Lender?** No

**Eligible for System Emails?** Yes **Selling Home? Listing Addresses?** Yes Off

**Add a Reminder**

**Due Date:** 2/4/11

**Time:** 8:00 PM

**Contact:** Steve Marshall

**Reminder:** Call Steve about staging consultation.

\* - These fields are required.

Save Cancel

**Current Reminders**

- 2/5/11 8:01 AM**  
Call Steve  
Source: User
- 2/5/11 8:02 AM**  
This is a reminder to contact Steve Marshall  
Source: User

**Add a Reminder**



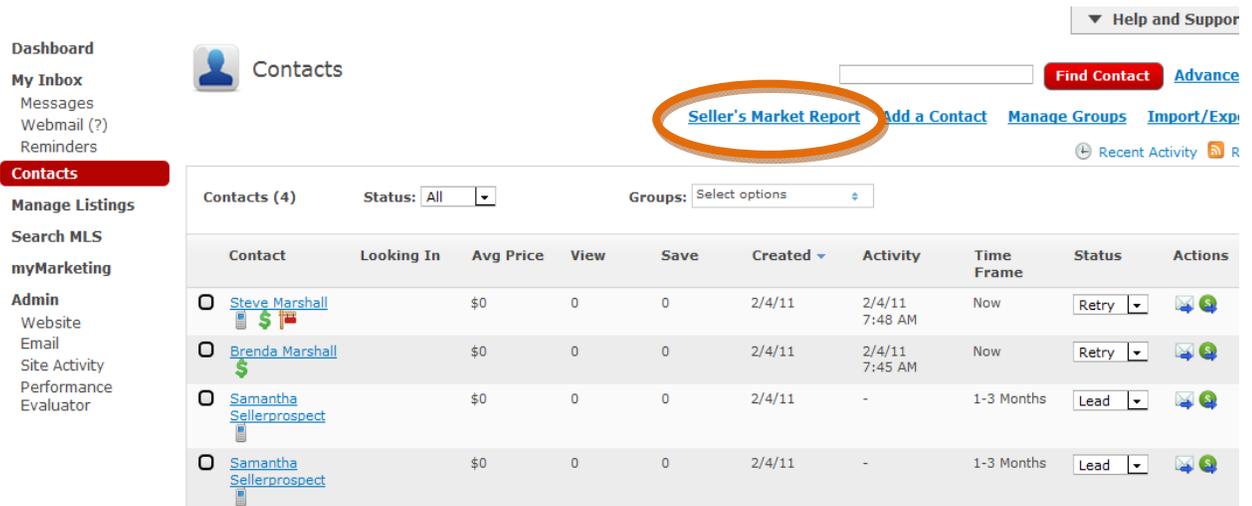
## Your Turn!

1. Open one of your contact records.
2. Add a reminder for the next day to give them a call or send them an email.

### *Sending Seller's Reports*

From your myContacts dashboard you have easy access to send a Seller's Market Report to highlight the services you provide as an agent and help a contact who wants to sell a house understand what the house might be worth in the current market.

1. Click on **Seller's Market Report**.



The screenshot shows the myContacts dashboard interface. On the left is a navigation menu with options like Dashboard, My Inbox, Messages, Webmail, Reminders, Contacts (highlighted in red), Manage Listings, Search MLS, myMarketing, and Admin. The main content area is titled 'Contacts' and features a search bar, a 'Find Contact' button, and an 'Advance' button. A link for 'Seller's Market Report' is circled in orange. Below this are links for 'Add a Contact', 'Manage Groups', and 'Import/Export'. A table lists four contacts with columns for Contact, Looking In, Avg Price, View, Save, Created, Activity, Time Frame, Status, and Actions.

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input type="checkbox"/> <a href="#">Steve Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:48 AM	Now	Retry	
<input type="checkbox"/> <a href="#">Brenda Marshall</a>		\$0	0	0	2/4/11	2/4/11 7:45 AM	Now	Retry	
<input type="checkbox"/> <a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	1-3 Months	Lead	
<input type="checkbox"/> <a href="#">Samantha Sellerprospect</a>		\$0	0	0	2/4/11	-	1-3 Months	Lead	

2. Enter the required information and choose to either print or email.

Dashboard

**My Inbox**

Messages

Webmail (?)

Reminders

**Contacts**

Manage Listings

Search MLS

myMarketing

**Admin**

Website

Email

Site Activity

Performance

Evaluator

### Send a Seller's Report

A seller's market report highlights the services you provide as an agent and helps a contact who wants to sell a house understand what the house might be worth in the current market. Enter the listing information, and the system will show current listings that are similar. You can choose up to three listings to include in the report.

**Enter Property Information**

**Name:\***

**Listing Type:**

**Area:\***

**Number of Beds:\***

**Number of Baths:\***

**Estimated Price:\***

**Email or Print**

Print  Email

**Continue** **Cancel**

▼ Help and Support

**Find Contact** [Advance](#)

[Page Groups](#) [Import/Exp](#)

Recent Activity

Status	Actions
Retry	
Retry	
Lead	
Lead	

3. Choose up to three comparable listings from the list returned.

### Send a Seller's Report

Select up to 3 listings to include with report

Include listings that are very similar to the home the contact wants to sell

	MLS #	Location	ZIP Code	Price	Beds	Baths	Sq Ft
<input checked="" type="checkbox"/>	5472617	11116 Alison Parke Austin, TX	78750	\$299,000	4	4	3,218
<input checked="" type="checkbox"/>	3096694	9407 Ashton Austin, TX	78750	\$299,990	3	3	2,400
<input type="checkbox"/>	4750316	6516 Cascada Austin, TX	78750	\$299,900	3	3	2,069
<input checked="" type="checkbox"/>	7251045	7322 Cave Austin, TX	78750	\$275,000	3	3	1,900

**< Back**
**Continue**
**Cancel**

- The report that is created includes a message from you and information on the comparable properties.

**Prepared For** - Sally Seller

**Location:** Austin, TX (Travis)  
**Beds:** 3 **Baths:** 2  
**Price:** \$300,000

**Potential Advertising**

At my Web site <http://shannon.servingkwbrokerage.com> I have had 71 visitors in the last three months that have looked at homes similar to yours. Once you become a client, I will be able to market via email to all 1 people and track the results for you to see in real time.

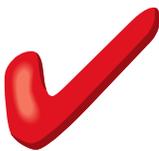
**My Web site had 71 visitors in the last 3 months who would likely be interested in your home. I am part of a network of sites where 178 visitors in the last 3 months would likely be interested in your home.**

My Web site is an integral part of my marketing strategy. I have many visitors viewing my site every month. That means more **exposure** for your home leading to **less time** on the market. The extent of my online marketing is unmatched. I go above and beyond the call. Once you become a client you will receive your own login information to see in **real time** how many people have looked at your home and requested a visit or more information. You will be able to easily see how well advertising campaigns went.

**Comparable Properties on the Market**

		
<b>Austin - \$270,000</b> Beds: 4 Bath: 4 Sq ft: 3107 ID: 4323398	<b>Austin - \$270,000</b> Beds: 3 Bath: 4 Sq ft: 2914 ID: 6123800	<b>Austin - \$274,990</b> Beds: 3 Bath: 3 Sq ft: 2370 ID: 5215612

## Your Turn!

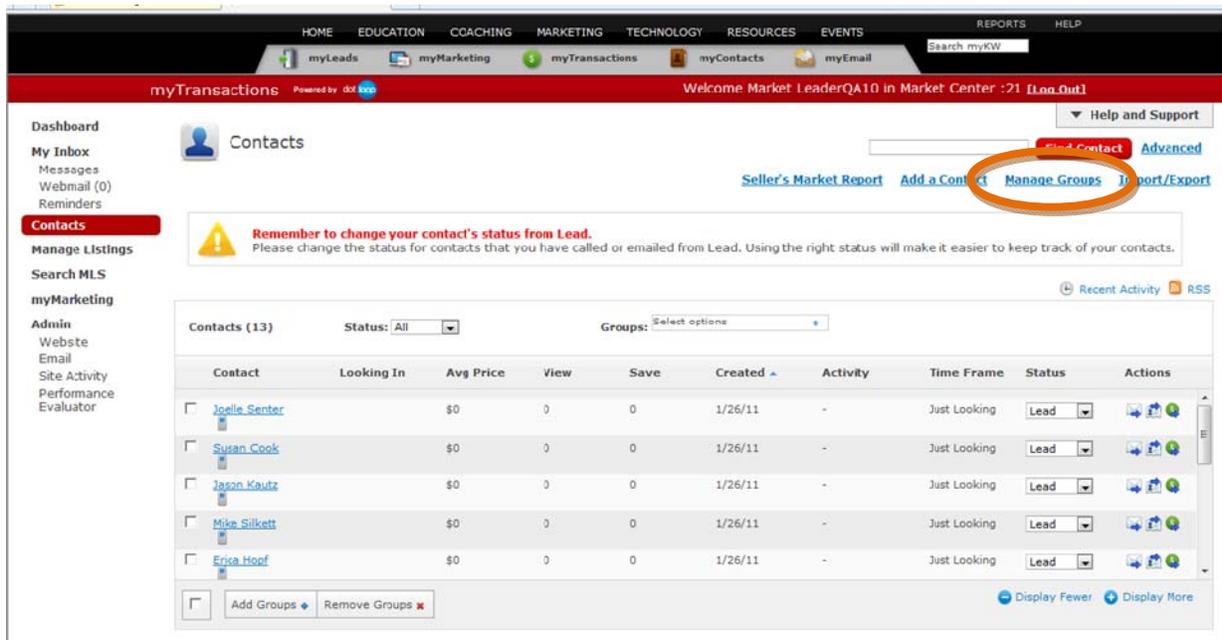


- Create a Seller's Report for yourself and email it.  
(You should have registered yourself as a lead in your eEdge website in Lesson 4, if not, do so now).
- Check your email and see how it looks!

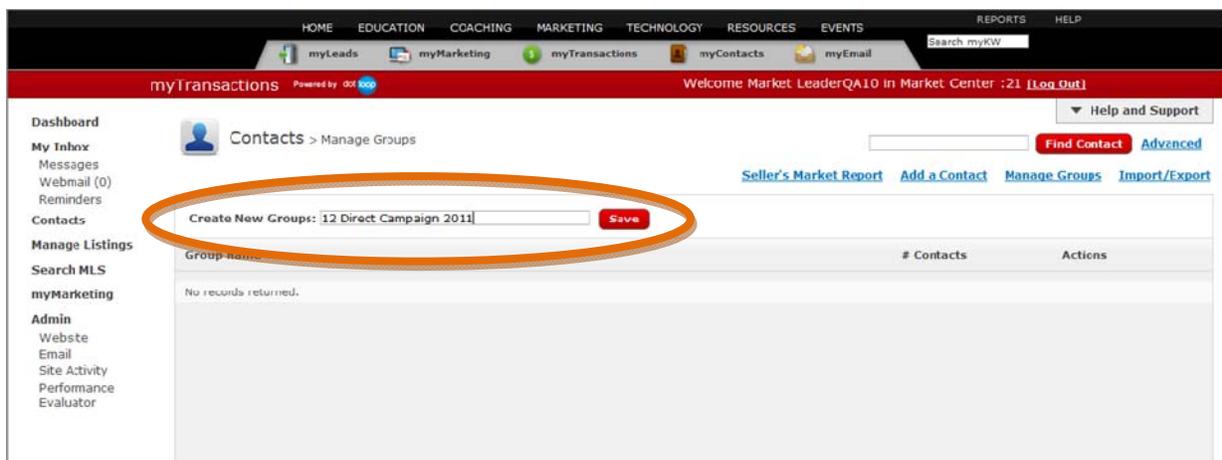
## Creating Groups

Groups allow you to target campaigns to a specific subset of individuals with a shared interest or common outcome. For example, you may have a group of individuals who all live in one neighborhood, or who are all real estate investors. Creating groups makes it easy to use myMarketing to set up automated campaigns!

1. Click **Manage Groups**.



2. Create a group for the campaign you are setting up. Now you have a group for your campaign, but no contacts are in the group.



3. Click **Contacts** from the left navigation and from your contact list, select the contacts you want to add to the group.

myTransactions Welcome Market LeaderQA10 in Market Center :21 [Log Out]

Dashboard My Inbox Messages Webmail (0) Reminders **Contacts** Manage Listings Search MLS myMarketing Admin Website Email Site Activity Performance Evaluator

Remember to change your contact's status from Lead. Please change the status for contacts that you have called or emailed from Lead. Using the right status will make it easier to keep track of your contacts.

Contacts (13) Status: All Groups: Select options

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input checked="" type="checkbox"/> Joelle Senter		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Susan Cook		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Jason Kautz		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Mike Silkett		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input type="checkbox"/> Erica Hopf		\$0	0	0	1/26/11	-	Just Looking	Lead	

Add Groups Remove Groups Display Fewer Display More

4. Click the **Add Groups** button and select the group you want.

myTransactions Welcome Market LeaderQA10 in Market Center :21 [Log Out]

Dashboard My Inbox Messages Webmail (0) Reminders **Contacts** Manage Listings Search MLS myMarketing Admin Website Email Site Activity Performance Evaluator

Remember to change your contact's status from Lead. Please change the status for contacts that you have called or emailed from Lead. Using the right status will make it easier to keep track of your contacts.

Contacts (13) Status: All Groups: Select options

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input checked="" type="checkbox"/> Joelle Senter		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Susan Cook		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Jason Kautz		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input checked="" type="checkbox"/> Mike Silkett		\$0	0	0	1/26/11	-	Just Looking	Lead	
<input type="checkbox"/> Erica Hopf		\$0	0	0	1/26/11	-	Just Looking	Lead	

Add Groups Remove Groups Display Fewer Display More

12 Direct Campaign 2011  
 33 Touch Campaign 2011  
 8x8 Campagin 2011

Add Manage All Groups

Now you will be able to easily filter your database by group. You can also now easily set the group up on a campaign using myMarketing (see myMarketing section of this guide).



## Your Turn!

1. Create a group called 33 Touch.
2. Add yourself to the group.

### *Adding or Removing a Contact from a Group*

1. Check the box next to the person you wish to add or remove and click on either **Add Groups** or **Remove Groups**. Select the group.

The screenshot shows the 'myContacts' interface. On the left is a navigation menu with items like 'My Inbox', 'Messages', 'Webmail (1)', 'Reminders', 'Contacts', 'Manage Listings', 'Search MLS', 'Create Marketing', and 'Admin'. The main area displays a table of contacts with columns: Contact, Looking In, Avg Price, View, Save, Created, Activity, Time Frame, Status, and Actions. A dropdown menu is open over the 'Susan Rider' contact, listing groups: '12/33 Mass Email List', '33 Touch Call List', '8 x 8 Campaign', 'First Time Home Buyer', 'Investor', and 'Open House'. At the bottom of the dropdown are 'Add' and 'Manage All Groups' buttons. Below the table are 'Add Groups' and 'Remove Groups' buttons. A warning message at the top of the main area says: 'Remember to change your contact's status from Lead. Please change the status for contacts that you have called or emailed from Lead. Using the right status will make it easier to keep track of your contacts.'

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
Alexis Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active	[Icons]
Tim Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active	[Icons]
Susan Rider		\$0	0	0	2/4/11	-	Just Looking	Active	[Icons]
Jim		\$0	0	0	2/4/11	-	Just Looking	Active	[Icons]
Griff		\$0	0	0	2/4/11	-	Just Looking	Active	[Icons]
Mad		\$0	0	0	2/9/11	-	Just Looking	Active	[Icons]



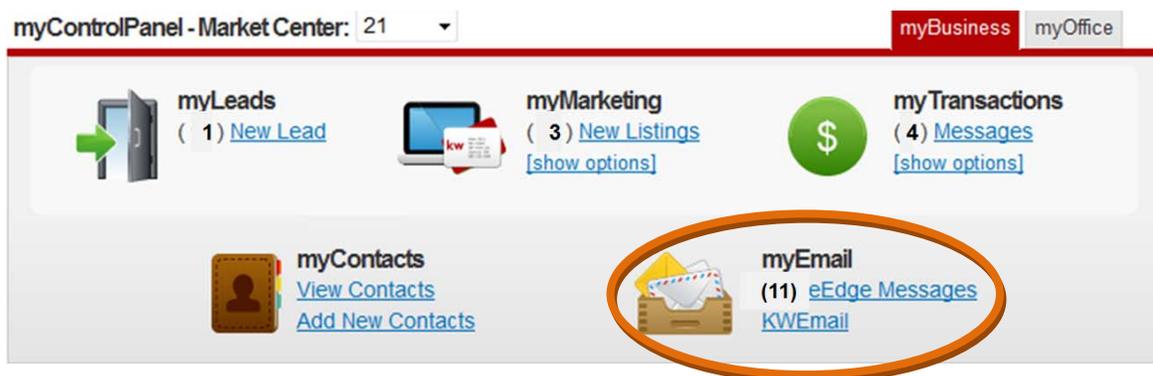
## Lesson 6: myEmail

## Introduction

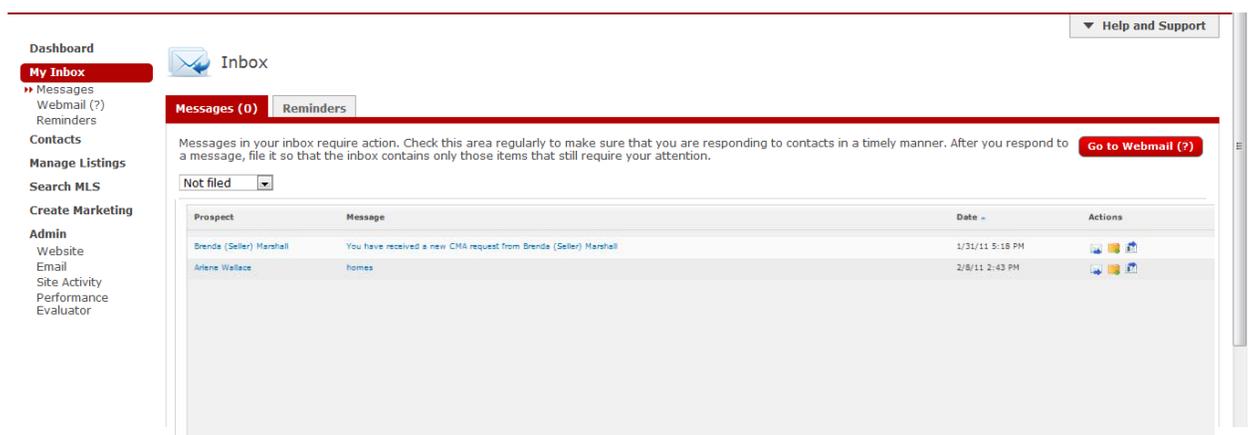
When you activated the eEdge system, you were provided with a new "@kwrealty.com" email address. This email address is integrated into eEdge, so all correspondences sent to this address, or from this address, will be saved and filed with the contact's record. It is recommended that you use your @kwrealty.com address for all lead correspondences so that you can take advantage of this tracking.

## Accessing myEmail

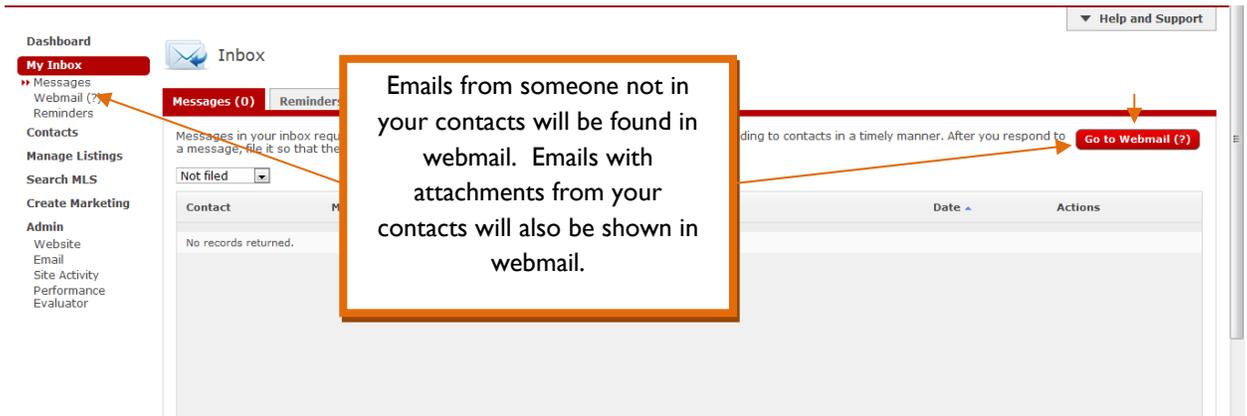
1. Click on **myEmail > eEdge Messages** on your Control Panel.



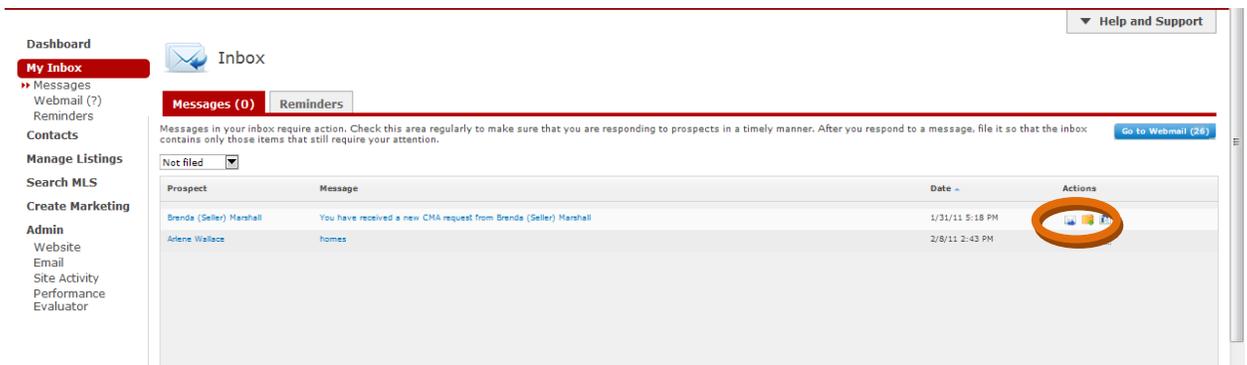
2. Your eEdge inbox will display any new messages from contacts in your database. Your leads and contacts dashboard will also display critical new messages.



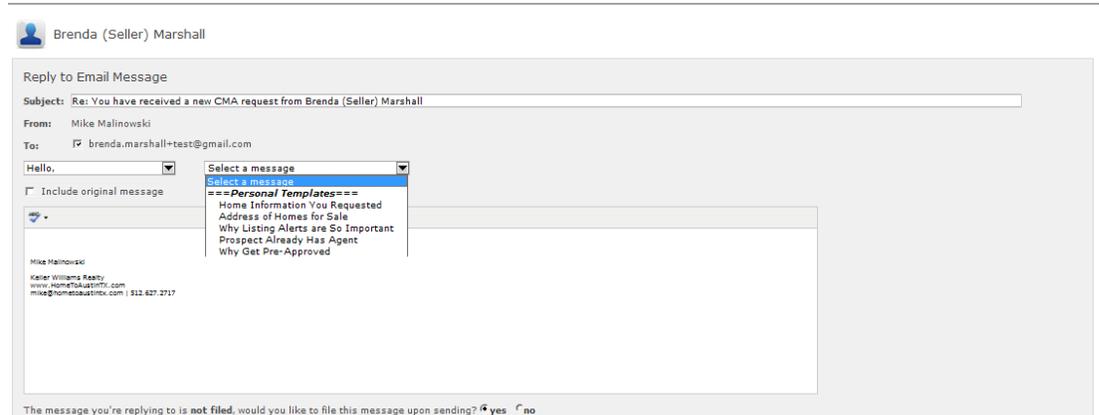
3. If you have received any emails to your @kwrealty.com email address from individuals that are NOT yet contacts in your database, you will see them listed under eEdge Webmail. Emails from your contacts that have attachments will also be found in your eEdge Webmail.



4. Choose to reply to the email or file it. To keep your inbox tidy, file messages that you reply to via phone.



- When replying to messages, you can choose to use one of the five provided templates, if desired.



- The emails you received and sent are stored in the system with the contact's record.

## Your Turn!



- In lesson 4, you registered as a lead on your eEdge website with your personal email address. Send an email to your @kwrealty.com email address from this personal email address.
- Check your inbox and reply to your message using one of the pre-defined templates.



## Lesson 7: myMarketing

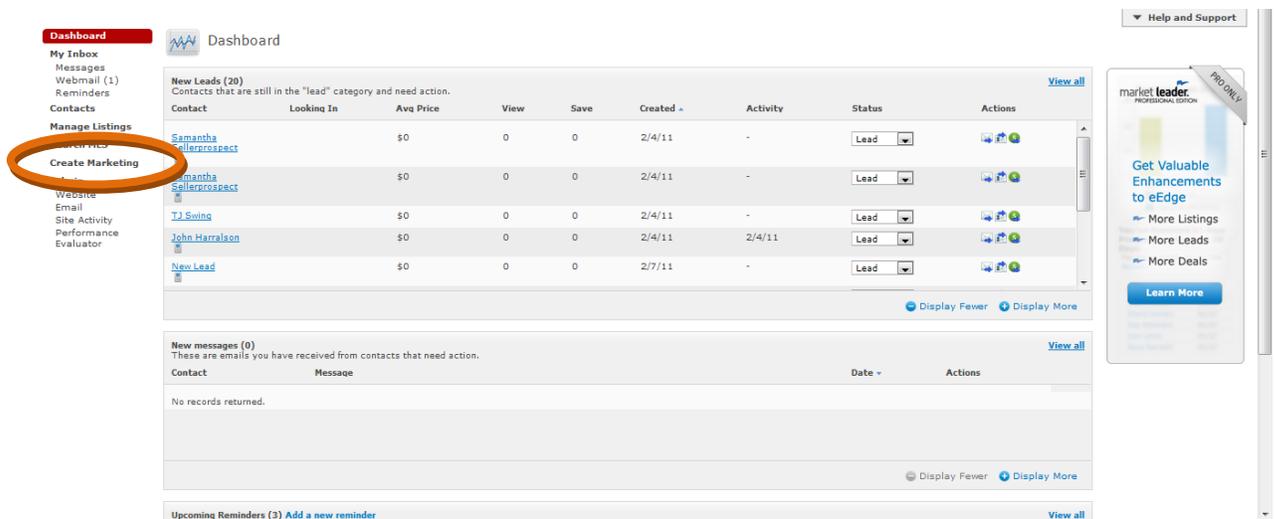
## Set-up of myMarketing

Before you get started in myMarketing, you'll need to upload your photo and logo so that your myMarketing materials are pre-populated with these images.

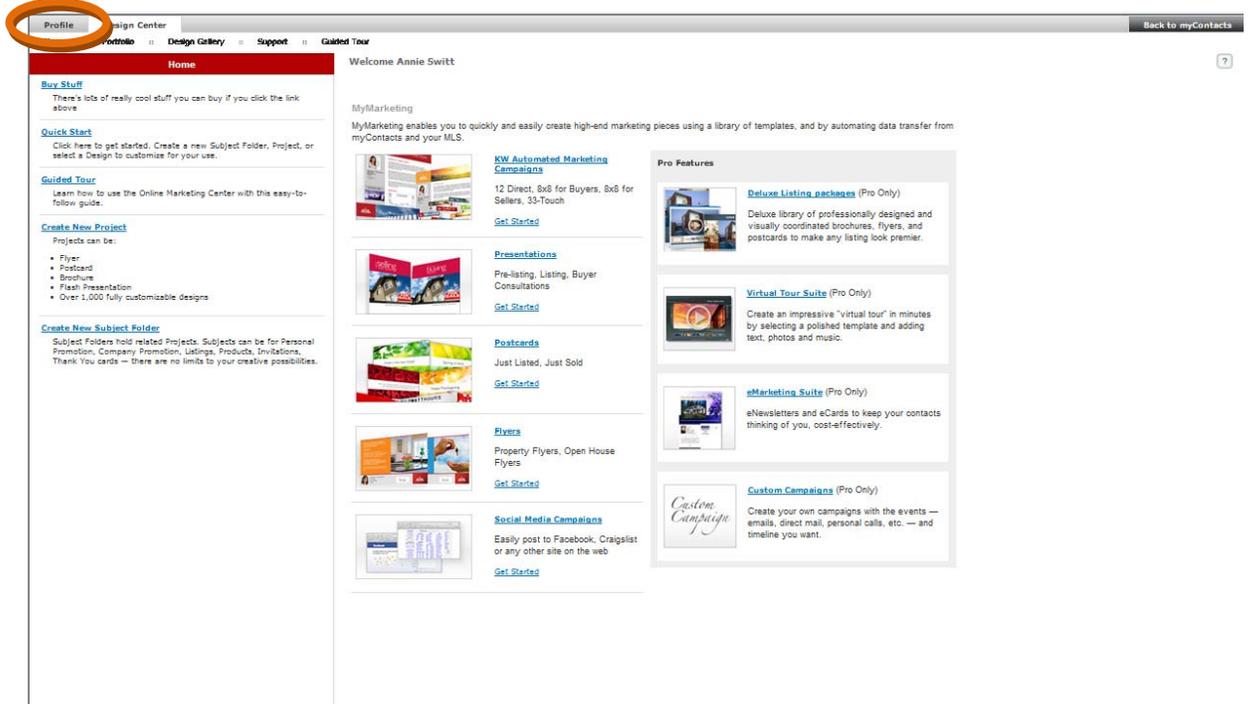
1. Click on **myMarketing > Market Me** in your eEdge Control Panel



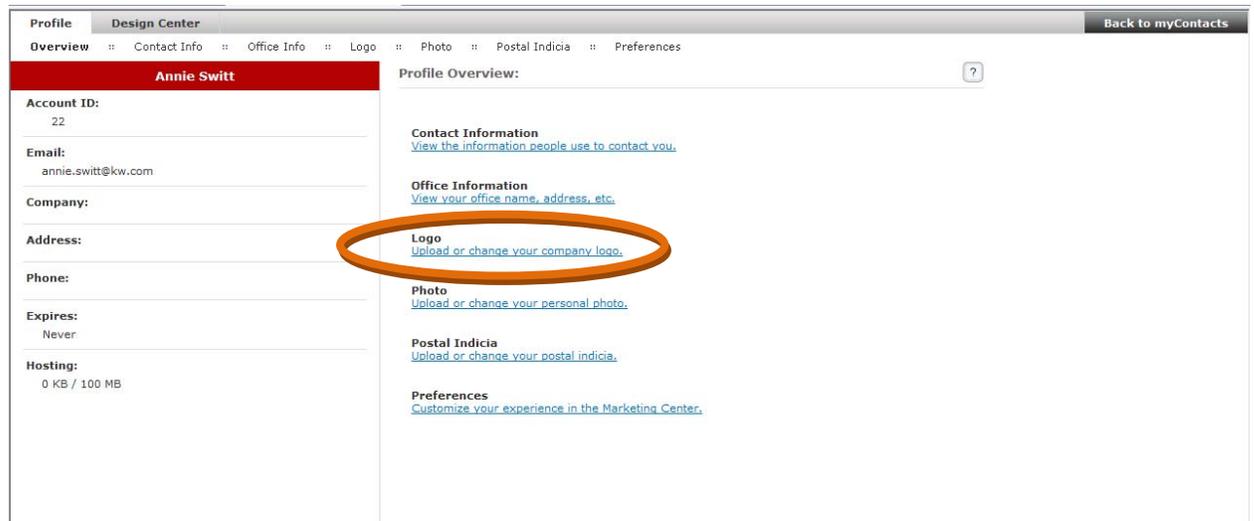
2. Choose **Create Marketing**.



3. You will be brought to the home page of the Design Center. Choose **Profile**.



4. Click to upload your logo.



5. Upload a logo, or choose one of the provided logos.

**Profile** | Design Center | Back to myContacts

Overview :: Contact Info :: Office Info :: **Logo** :: Photo :: Postal Indicia :: Preferences

**Annie Switt**

**Account ID:**  
22

**Email:**  
annie.switt@kw.com

**Company:**

**Address:**

**Phone:**

**Expires:**  
Never

**Hosting:**  
0 KB / 100 MB

**Profile Logo:** ?

**Upload a Logo:**

For best results, your Company Logo should be a 150dpi full color image with a width-to-height ratio of 2:1. We suggest using an image which is at least 200 pixels wide x 100 pixels high.

Instructions:

1. To Upload your image select "Upload Image". A pop-up window will appear. Click "Browse.."
2. In the dialog box that appears, select your file and click "Open".  
Tip - In Windows XP if you can't remember the name, select "Thumbnails" from the drop down list with the black arrow next to it. You will be able to see all the photos.
3. Select "Send File". Wait for the image to show in the Photo box (above).

**Choose from one of the provided Logos:**



6. Follow the same steps to upload your photo.

## *Campaigns & Presentations Available*

The eEdge myMarketing module includes several campaigns to market your business and your listings. These pieces are aligned with the proven models of success found in the *Millionaire Real Estate Agent*. The campaigns are beautifully and professionally designed to increase your mindshare and conversion rates. Below you will see the current campaigns and presentations available in the eEdge system. Canadian versions of these will also launch in the eEdge system. More will be rolling out over the coming months, so stay tuned! You can also continue to access all current marketing materials in the marketing library.

### 1. 8x8 s

An 8x8 is eight touches over eight weeks and is designed to activate a relationship. myMarketing includes two 8x8 campaigns, one for buyer leads and one for seller leads.



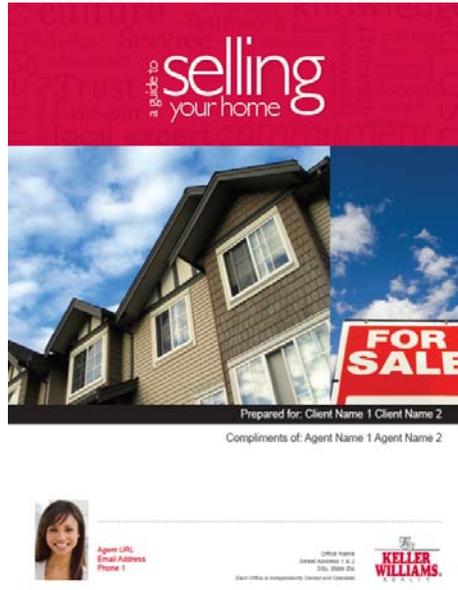
### 2. 33 Touch

Follow your 8x8 campaign with a 33 Touch. Target the people who know you, have or will do business with you in the future or will send you referrals.



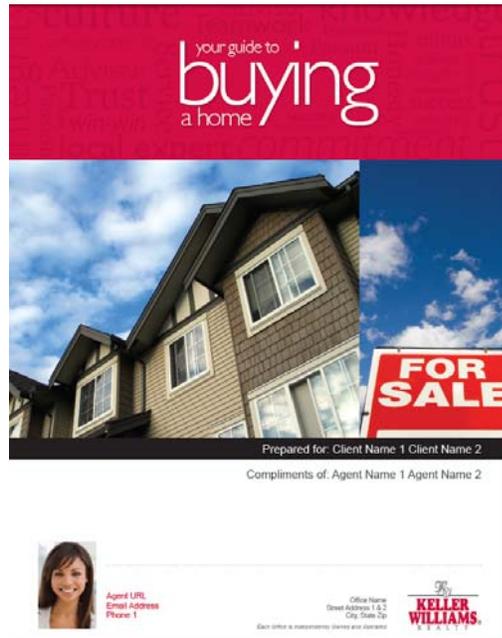
#### 4. Pre-Listing Packet & Listing Presentation

A professionally designed Pre-Listing Packet and Listing Presentation guide are now at your fingertips!



#### 5. Buyer Consultation

A professionally designed Buyer Consultation guide is available as well.



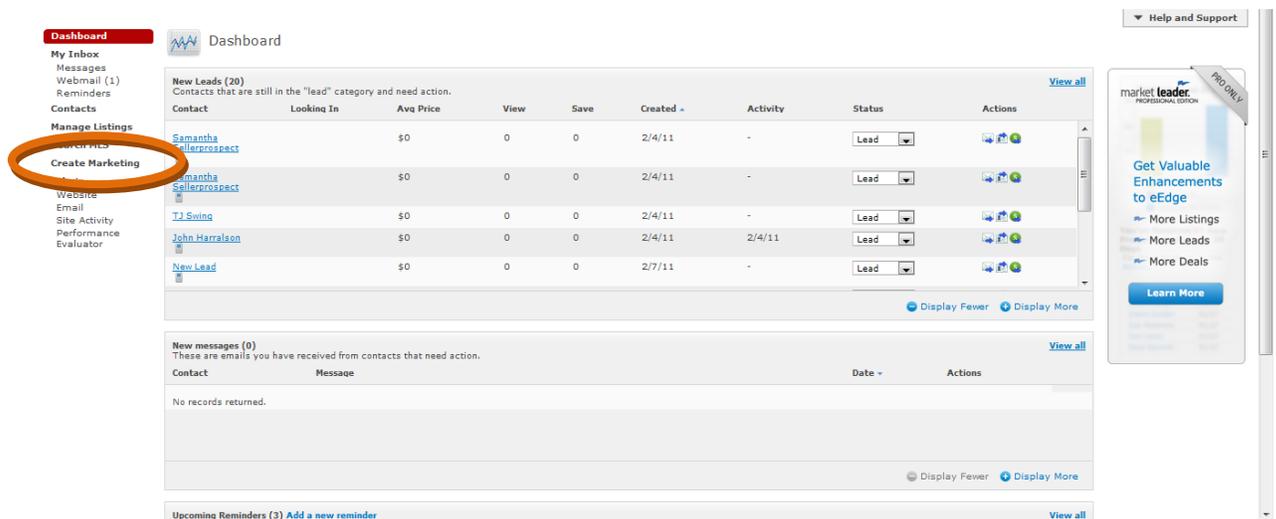
## Customizing a Campaign

The campaigns available in myMarketing are completely customizable. To customize a campaign:

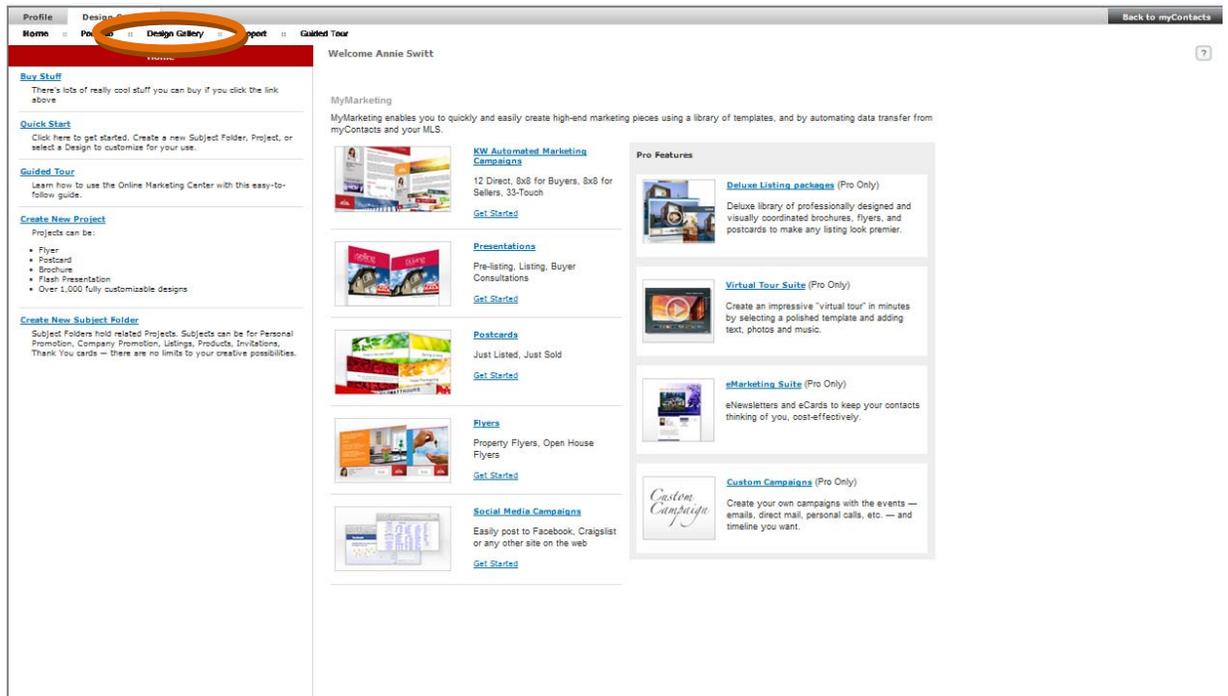
1. Click on **myMarketing > Market Me** in your eEdge Control Panel



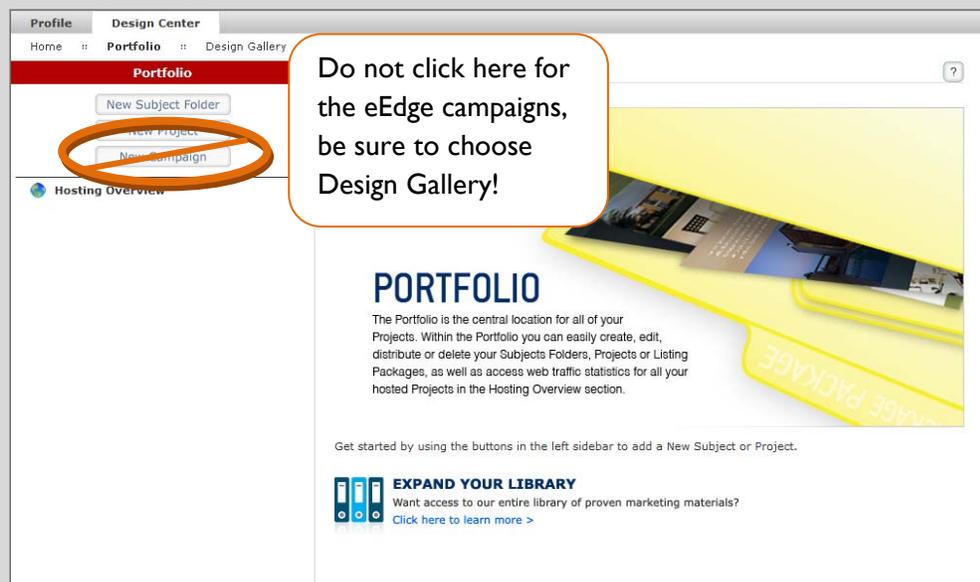
2. Choose **Create Marketing**.



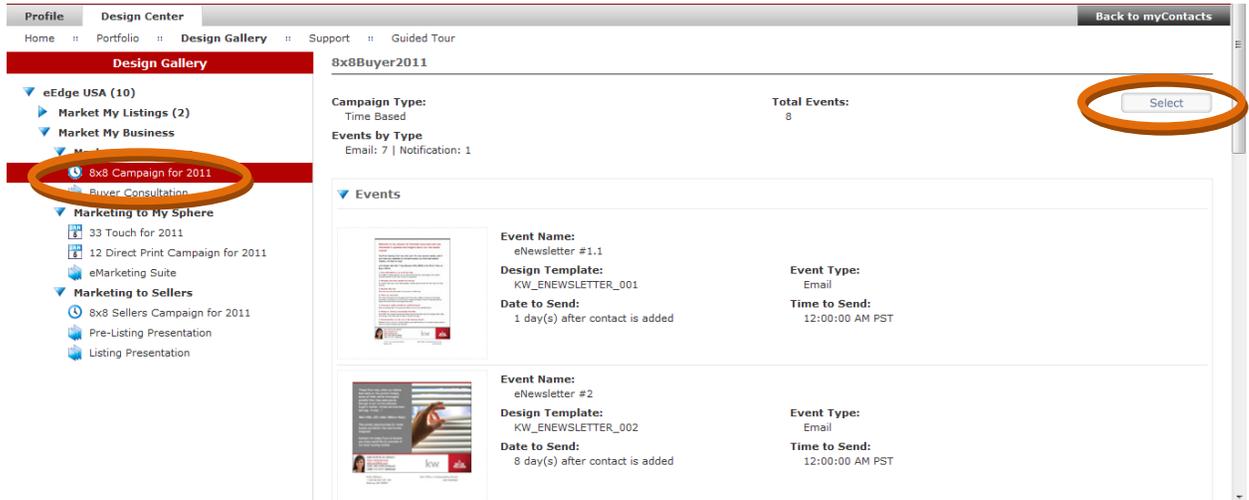
3. You will be brought to the home page of the Design Center. Choose **Design Gallery**.



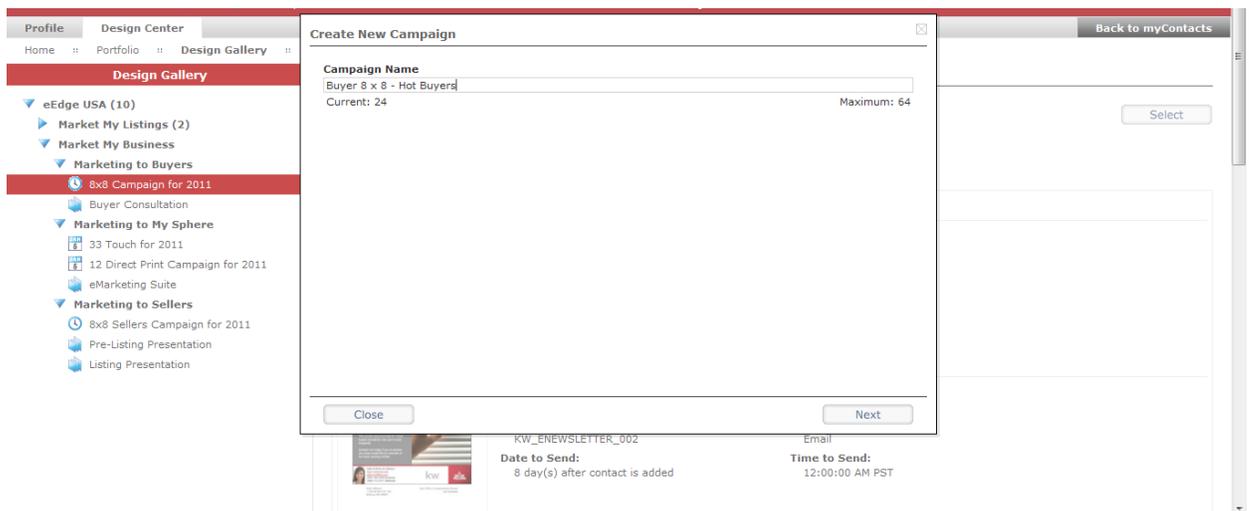
**Warning! In order to access the eEdge campaigns, you must go to the Design Gallery as show above. Clicking on New Campaign on the Portfolio tab will not load the eEdge campaigns.**



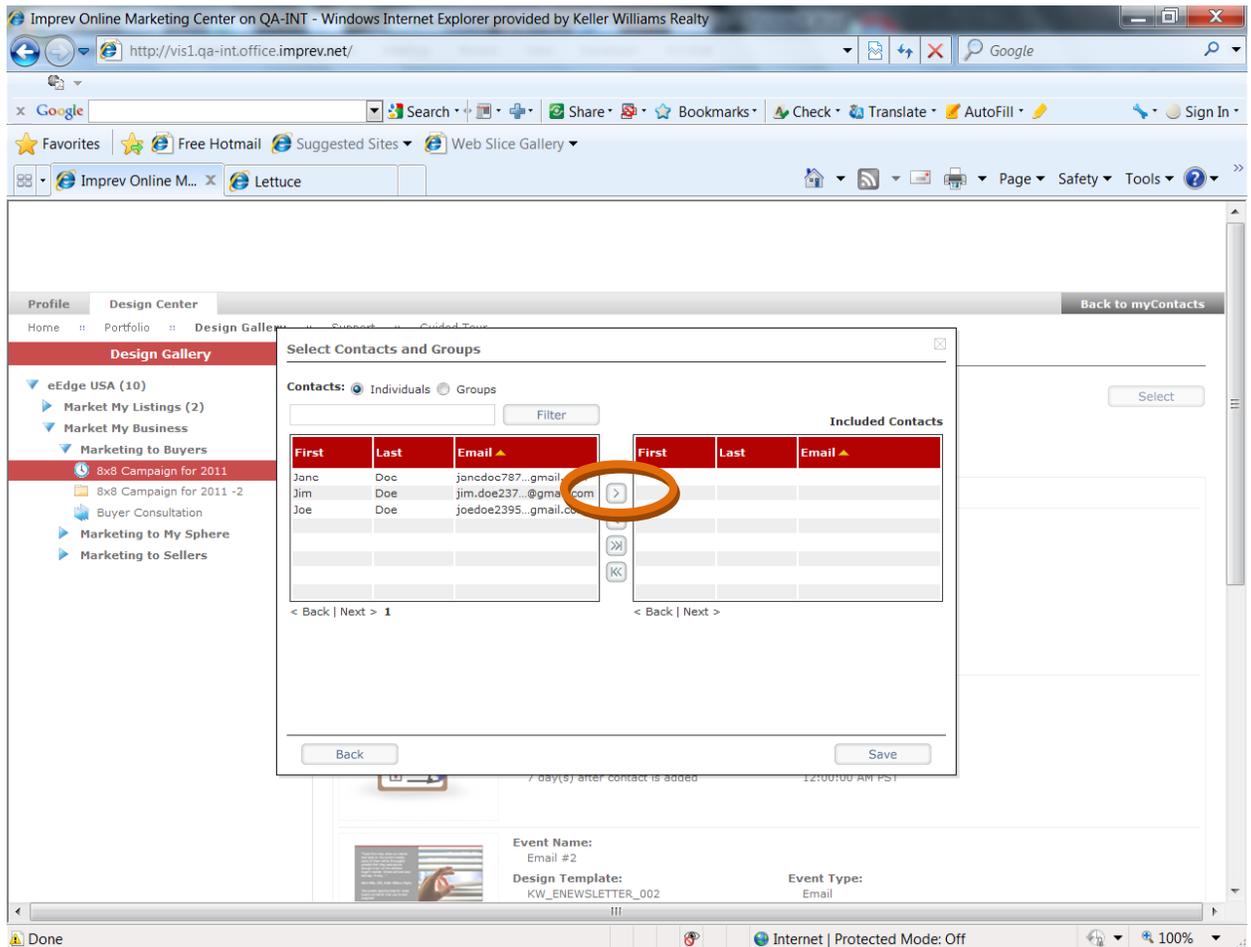
4. In the left-hand navigation, click on the campaign you want to customize. Here you can review the touches included in the campaign. Click **Select** to choose the campaign.



5. Give your campaign a name and click **Next**.



6. You can add either individuals or groups to the campaign.
  - a) Select the individual or group you want to add and click the arrow. Continue until all individuals or groups are added.
  - b) Click **Save**.



- From the overview page that appears, you can review each touch in the campaign, edit it if necessary, change the date or time it will go out, view or edit the contacts assigned to it, and view the history of items sent out.

8. To edit an event (the date), click **Edit Event** and make any updates necessary. Note that for the 33-Touch Campaign, the scheduled dates will be set from KWRI – this ensures that we can include timely touches such as *This Month in Real Estate*.

9. To customize a piece:
  - a) Choose **Edit Project**.

b) eEdge will walk you through all the elements of the project and allow you to make edits to the text or images.

c) As you make changes, click **Preview** regularly to view your updates.

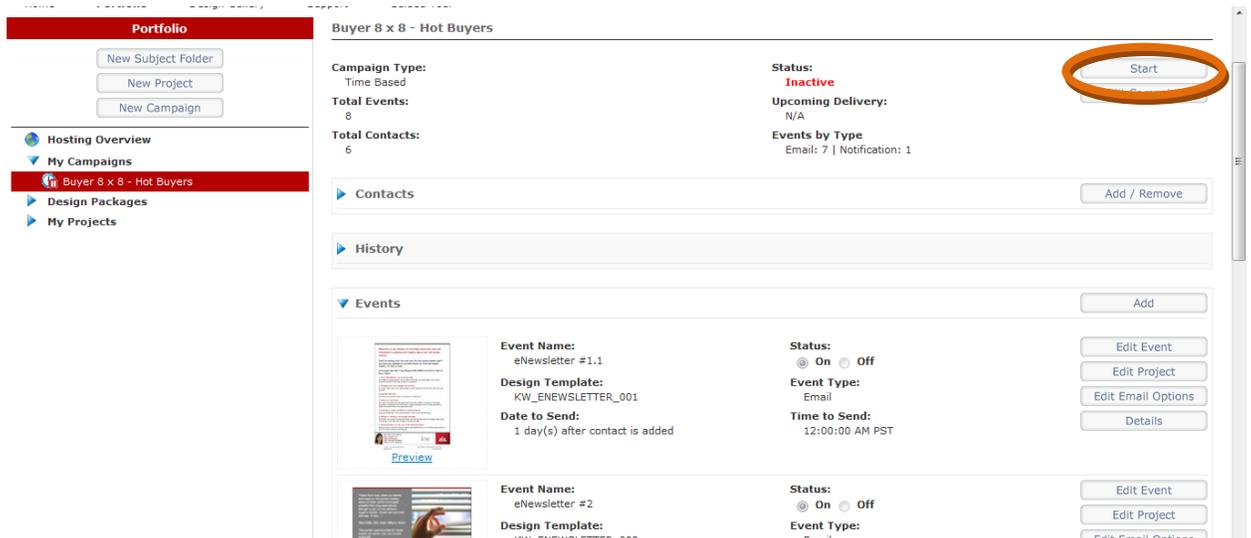


## Your Turn!

1. Choose one of the provided eEdge campaigns and customize.
2. Add yourself to the campaign.
3. Customize at least one marketing piece.

### Launching a Campaign

1. When you are happy with the campaign, click **Start** to launch.



2. The campaign will now show as Active.

Profile Design Center Back to myContacts

Home Portfolio Design Gallery Support Guided Tour

**Portfolio**

New Subject Folder  
New Project  
New Campaign

Hosting Overview  
My Campaigns  
Buyer 8 x 8 - Hot Buyers  
Design Packages  
My Projects  
Lookout Lane (1)  
Aldona's listing (1)  
8 x 8 Campaign (2)  
8 x 8 for Buyer Leads  
8 x 8 Campaign  
liting flyer (2)  
33 touce test

**Buyer 8 x 8 - Hot Buyers**

Campaign Type: Time Based  
Total Events: 8  
Total Contacts: 6

Status: **Active**  
Delivery: N/A  
Events by Type: Email: 7 | Notification: 1

Pause  
Edit Campaign

Contacts Add / Remove

History

Events Add

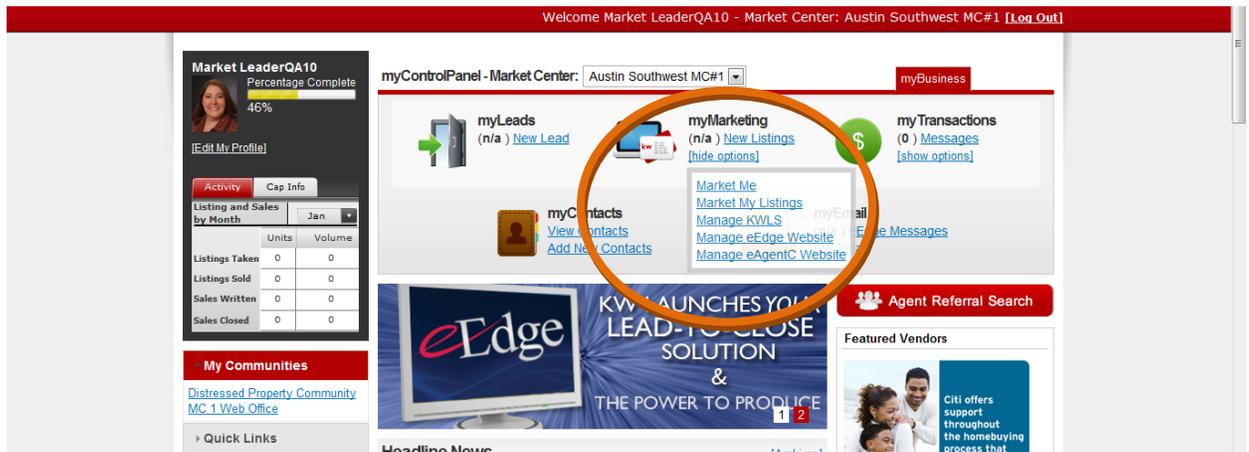
Event Name: eNewsletter #1.1  
Design Template: KW ENEWSLETTER\_001

Status: On Off  
Event Type: Email  
Edit Event  
Edit Project  
Edit Email Options

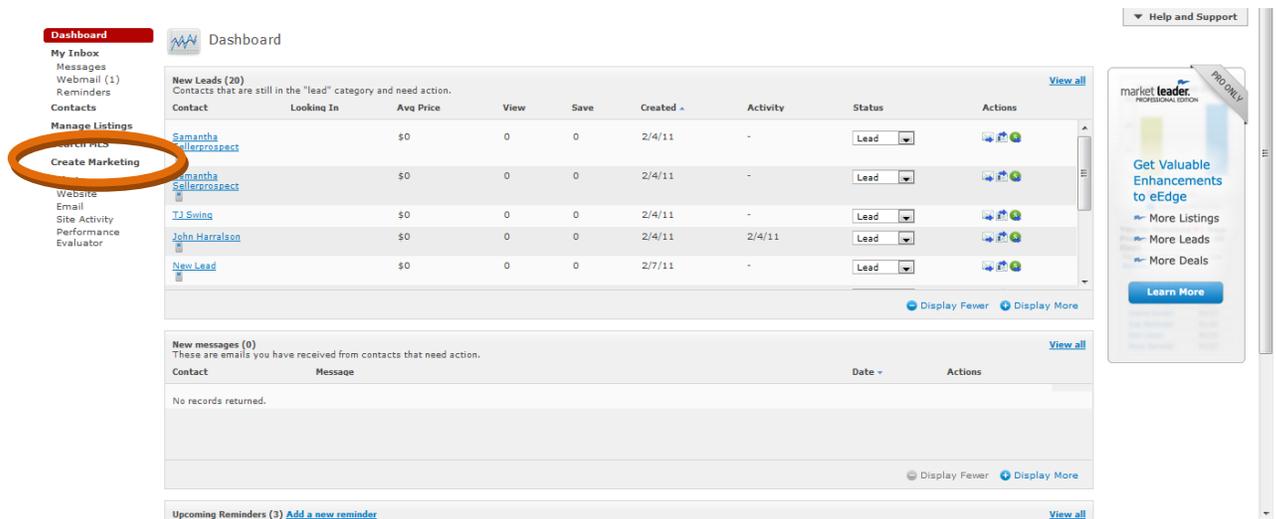
## Reviewing Campaigns You've Set Up

To review the campaigns you have set up:

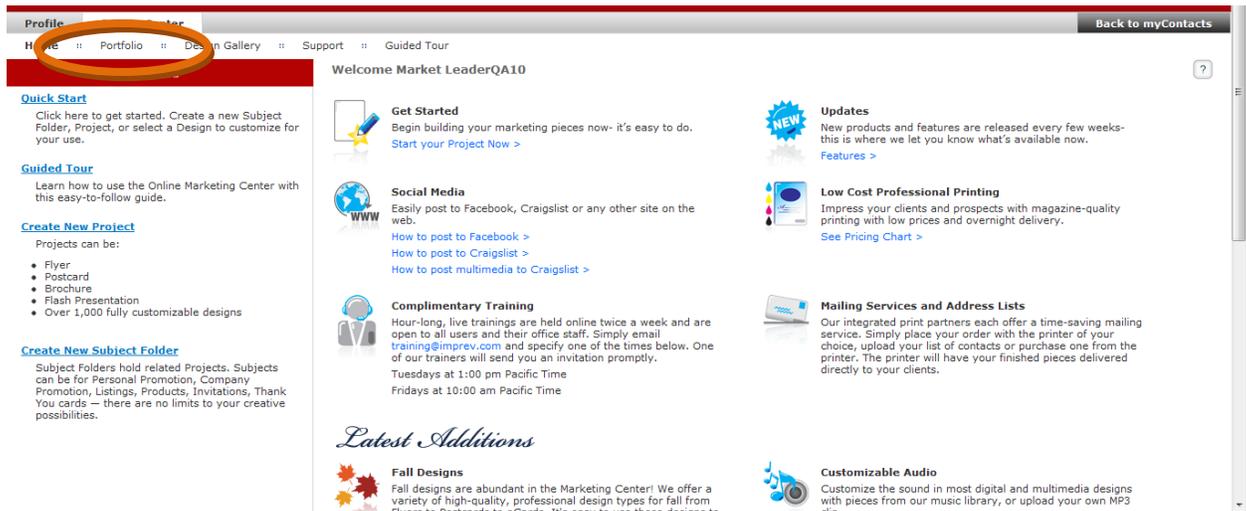
1. Click on **myMarketing** in your eEdge Control Panel and choose **Market Me**.



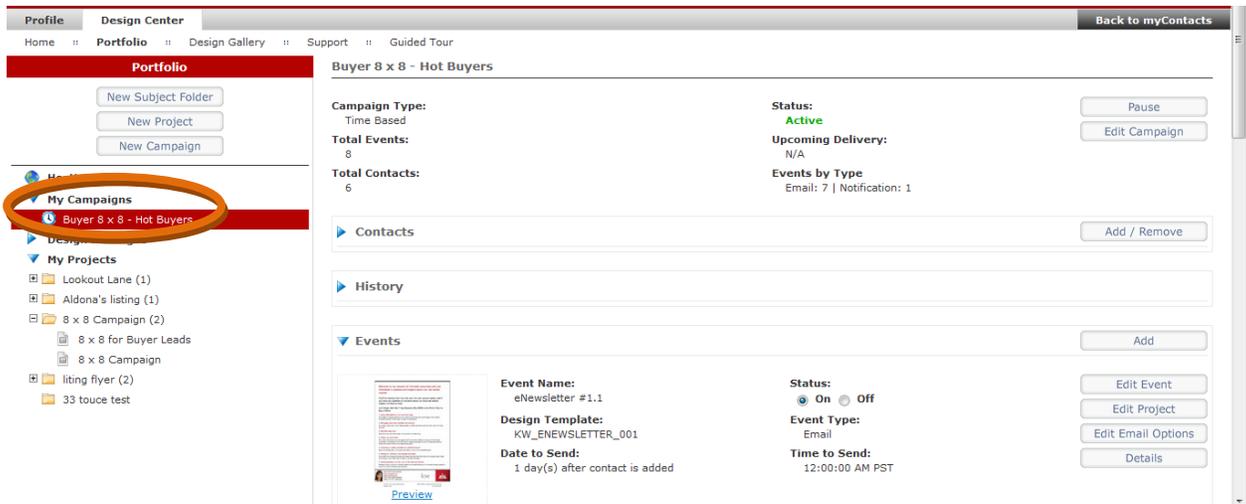
2. Choose **Create Marketing**.



3. You will be brought to the Design Center. Choose **Portfolio**.



- Choose your campaign under **My Campaigns**. From here you can view the current campaigns, contacts assigned, history, and make any edits necessary.



## Adding or Removing People From a Campaign

1. Follow the directions above to review a campaign.
2. Click **Add/Remove**.

The screenshot shows the 'Buyer 8 x 8 - Hot Buyers' campaign page. The interface includes a navigation menu on the left with options like 'New Subject Folder', 'New Project', and 'New Campaign'. The main content area displays campaign details such as 'Campaign Type: Time Based', 'Total Events: 8', and 'Total Contacts: 6'. A circled orange button labeled 'Add / Remove' is located in the top right corner of the campaign details section.

3. Click the left arrow to remove groups or individuals.

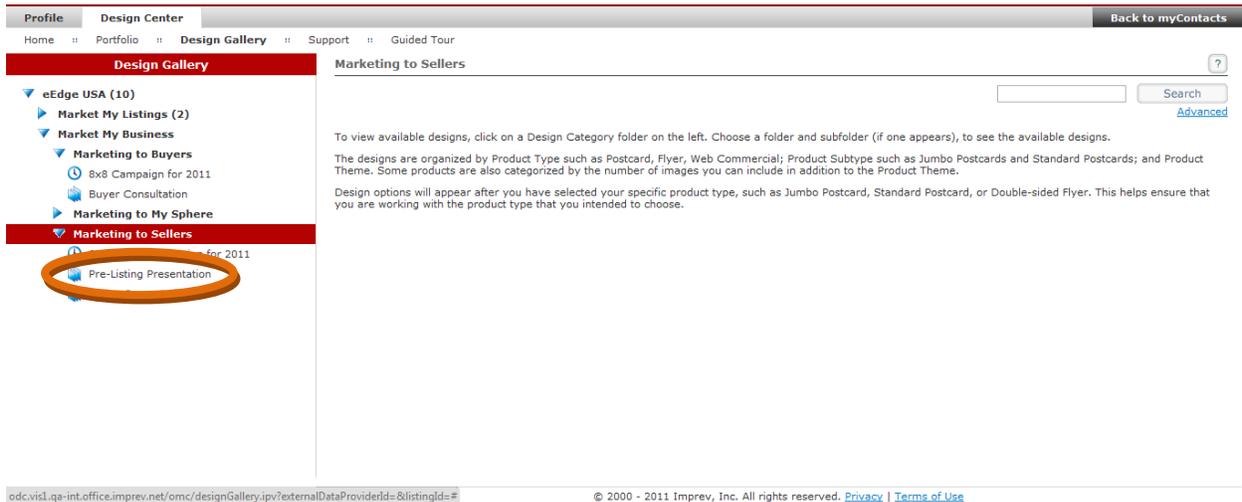
The screenshot shows the 'Select Contacts and Groups' dialog box. The dialog has two tabs: 'Individuals' and 'Groups'. The 'Groups' tab is selected, and a list of groups is displayed. A circled orange button with a left arrow is positioned over the list. Below the list, there are 'Close' and 'Save' buttons. The background shows the same campaign page as the previous screenshot.

**TIPS!** If you've assigned a group to a campaign, but there is one individual you want to remove from the campaign, you'll need to remove them from the group. See the myContacts lesson.

If you've assigned a group to a campaign and you add an individual to that group they will be launched on the campaign immediately with the next touch—no further action is required!

## Preparing for a Listing Appointment or Buyer Consultation

1. In the Design Gallery, choose **Market my Business > Marketing to Sellers** (or Buyers) and select the presentation you wish to edit..



2. Follow the steps to customize your presentation.

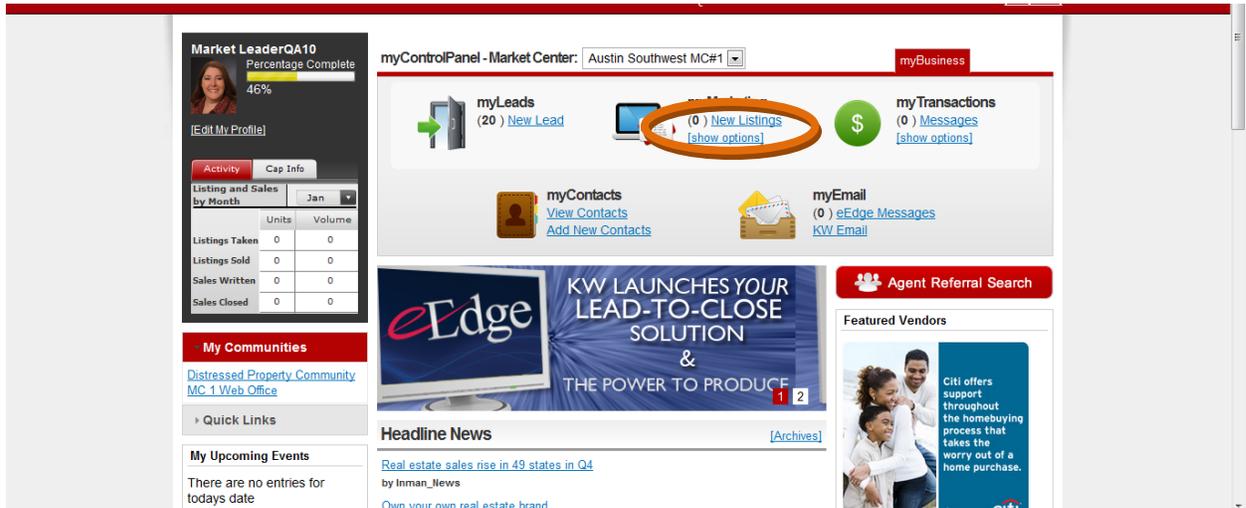


## Your Turn!

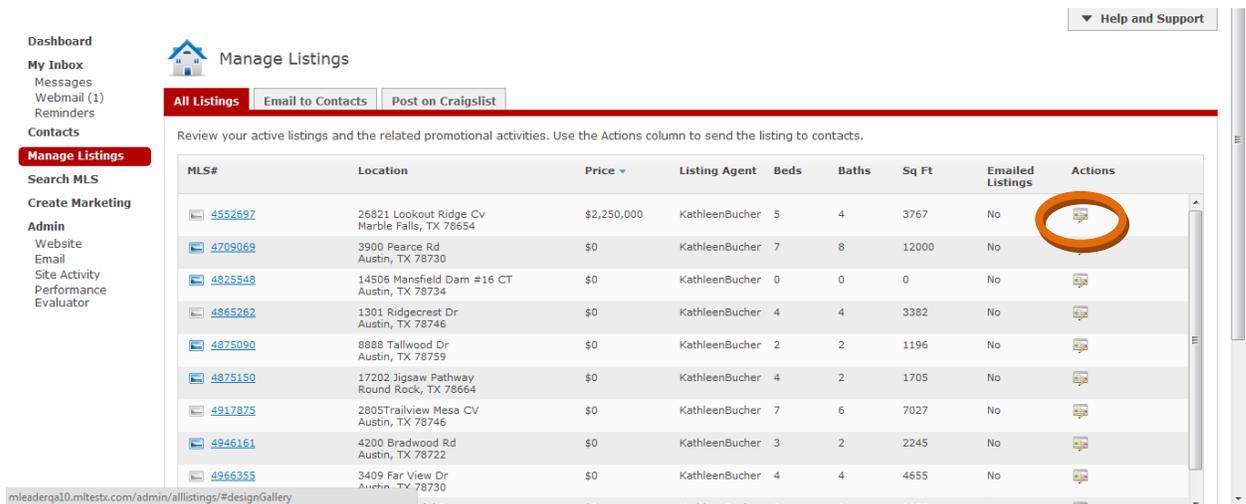
1. Customize either a pre-listing packet, listing presentation or buyer consultation.

## Market Your Listings

1. From your Control Panel, click **New Listings**.



2. From your listings list, click on **Create Marketing Material**.



3. Within the Design Gallery, choose the marketing material you wish to create and edit and customize as you desire. The listing information will be pre-populated for you. Please note that due to the way the MLS resizes your images for posting, you may need to re-upload property images to be appropriate for print (the system will notify you if an image is not print-quality).